

**PY381 Using the Single-Use Payroll Online Tool (SPOT)****Overview of the Using the Single-Use Payroll Online Tool (SPOT)**

The Single-Use Payroll Online Tool (SPOT) tool is used by Payroll Administrators to enter one-time transactions affecting pay or deductions in Cardinal. Transactions can be entered online in SPOT or through a spreadsheet upload.

This Job Aid provides information on entering earnings and deduction transactions (online or spreadsheet upload), deleting SPOT batches, SPOT transactions approvals, and reviewing batches after approval.

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**Enter an Earnings Transaction in SPOT**

1. Navigate to the **Enter SPOT Transactions** page using the following path:

**Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions**

**Enter SPOT Transactions**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Company

begins with ▼

Q

Pay Group

begins with ▼

Q

Pay Period End Date

= ▼

Q

Transaction Type

= ▼

▼

Batch Identity

begins with ▼

Batch Status

= ▼

▼

Created By

begins with ▼

Q

☐ Case Sensitive

Limit the number of results to (up to 300):

Search

Clear

Basic Search

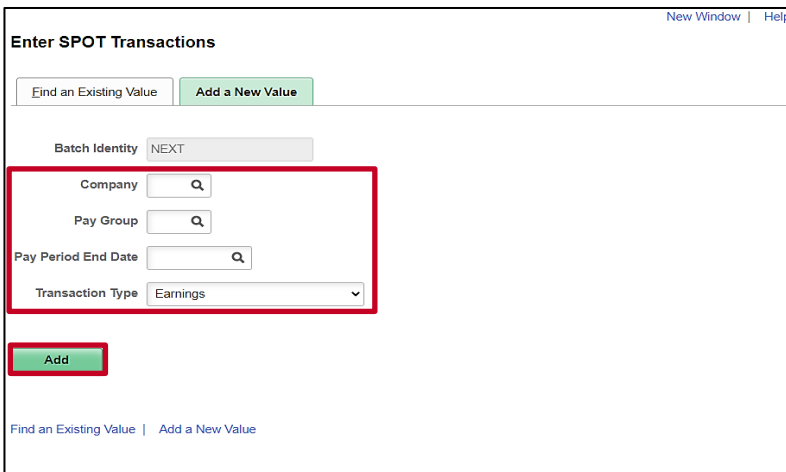
Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

2. Click the **Add a New Value** tab.

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The **Add a New Value** tab displays.



Enter SPOT Transactions New Window | Help

[Find an Existing Value](#) [Add a New Value](#)

Batch Identity

Company

Pay Group

Pay Period End Date

Transaction Type

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

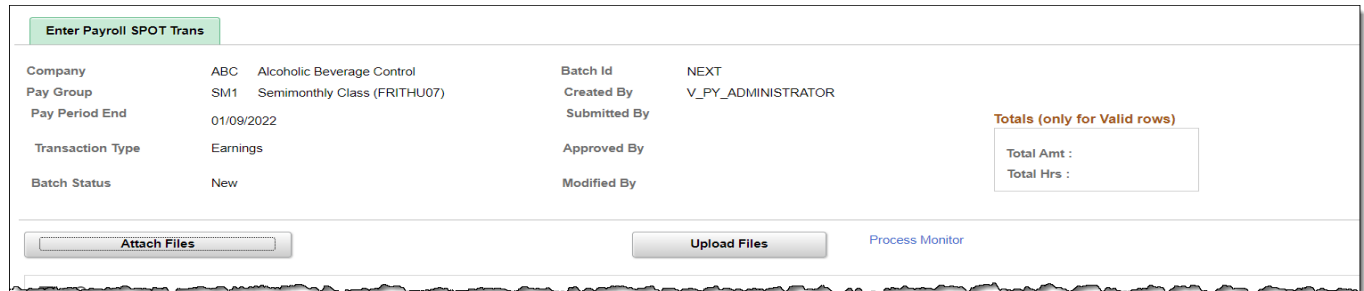
The following table provides a brief description of each field within the **Add a New Value** tab:

Field	Description
<b>Batch Identity</b>	Defaults to <b>NEXT</b> . This number will automatically generate when the batch is saved.
<b>Company</b>	Select your company. If you have access to enter transactions for multiple companies, select the appropriate company.
<b>Pay Group</b>	Select the appropriate employee(s) pay group(s). Employees entered in the SPOT batch must be in the Pay Group entered for the Pay Period selected. When you validate the batch, an error message displays indicating the employee is not in the Pay Group.
<b>Pay Period End Date</b>	Select the appropriate pay period end date for the transactions being entered (the pop-up window will only show pay periods that have not been confirmed).  When processing an Off-cycle transaction, use the pay period end date communicated by SPO.
<b>Transaction Type</b>	Select the appropriate type of transaction. <ul style="list-style-type: none"> <li><b>Earnings</b> – earnings in addition to time and labor or additional pay (typically one time or amounts that vary from pay period to pay period).</li> <li><b>Deductions</b> – deduction overrides, extra deductions, or deduction refunds.</li> </ul>

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3. Enter/select the appropriate values in the **Company**, **Pay Group**, **Pay Period End Date**, and **Transaction Type** fields.
4. Click the **Add** button.

The **Enter SPOT Transactions** page refreshes with the **Enter Payroll SPOT Trans** tab displayed.



**Note:** The **Header** section populates with the information previously entered on the **Add a New Value** tab.

The following table provides a brief description of additional fields included in the **Header** section of the **Enter Payroll SPOT Trans** tab:

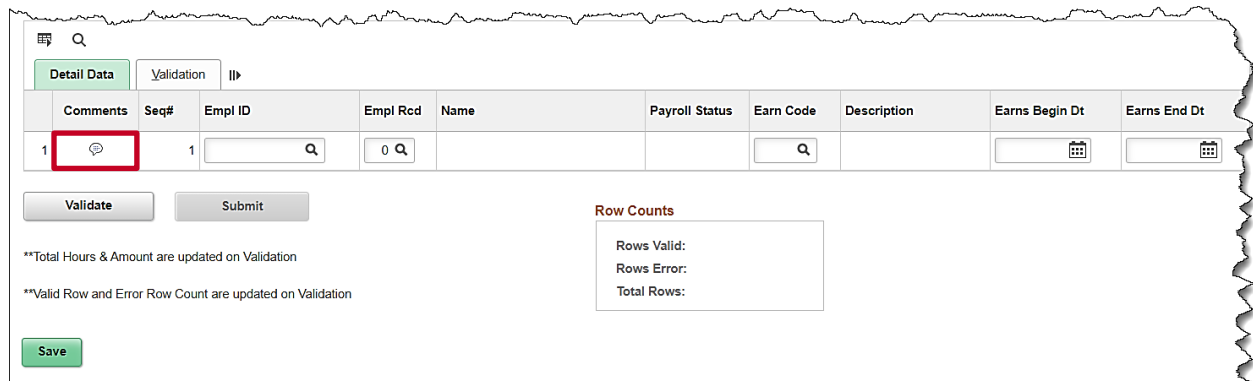
Field	Description
<b>Batch Status</b>	Updates based on actions taken to the batch. Batch statuses include: <ul style="list-style-type: none"> <li>• <b>New</b> – when a new batch is initiated</li> <li>• <b>Created</b> – when the batch is saved</li> <li>• <b>Validated</b> – when the batch is validated</li> <li>• <b>Modified after Validation</b> – when the batch is changed after validation</li> <li>• <b>Submitted</b> – when the batch is submitted for approval</li> <li>• <b>In Review</b> – when the approver is reviewing the batch for approval</li> <li>• <b>Closed</b> – after the approver has submitted the batch to payroll</li> </ul>
<b>Batch ID</b>	Defaults to “ <b>NEXT</b> ”; automatically updates when the batch is submitted.
<b>Created By</b>	Displays the name of the Payroll Administrator who created the batch.
<b>Submitted By</b>	Displays the name of the Payroll Administrator who submitted the batch.
<b>Approved By</b>	Displays the name of the SPOT approver who approved the batch.

**Note:** For further information on the **Attach Files** and **Upload Files** buttons, see the **Spreadsheet Upload** section of this Job Aid.

5. Scroll down to the **Detail Data** and **Validation** tabs below the Header section.

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The **Detail Data** tab displays by default.

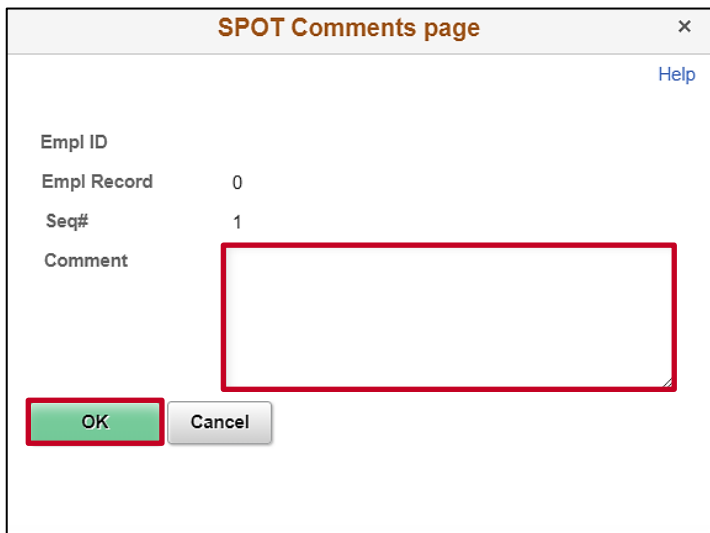


**Note:** Use the scroll bar at the bottom of the page to move left/right as required.

- a. The **Detail Data** tab is used for one-time transactions.
- b. The **Validation** tab is used to view the status of validated transactions.

6. Click the **Comments** bubble.

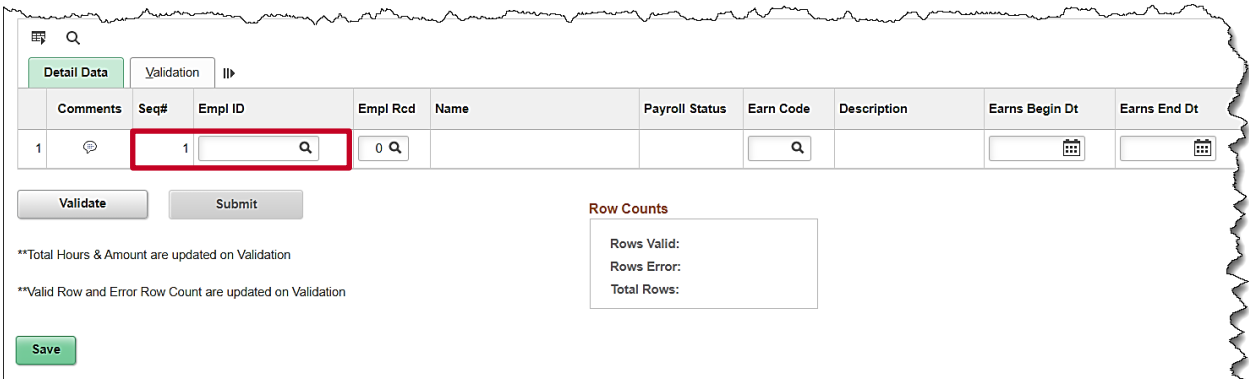
The **SPOT Comments** page displays in a pop-up window.



7. Enter any applicable comments in the **Comment** field, as required.
8. Click the **OK** button.

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The Detail Data tab returns.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt
1	1	1	0		Active				

Validate Submit

\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

Save

Row Counts

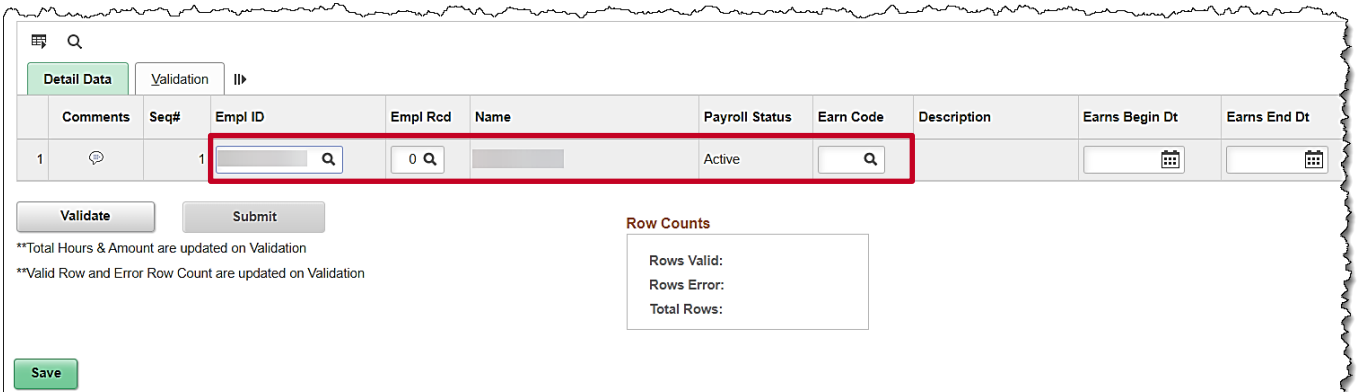
Rows Valid:

Rows Error:

Total Rows:

9. The **Seq#** field auto-populates and is read-only.
10. Enter/select the appropriate Employee ID using the **Empl ID** field look-up icon. An Empl ID not valid for the Company/Paygroup combination of the batch will create an error when the **Validate** button is clicked.

The **Detail Data** tab refreshes.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt
1	1	1	0		Active				

Validate Submit

\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

Save

Row Counts

Rows Valid:

Rows Error:

Total Rows:

11. Enter/select the applicable Empl Rcd as required using the **Empl Rcd** field look-up icon.
12. Verify the auto-populated Name in the **Name** field.
13. Verify the Payroll Status in the **Payroll Status** field.




**Note:** A Paysheet is created for pending SPOT transactions during the SPOT load if the Payroll Status is "**Terminated**".

14. Enter/select the appropriate Earnings Code using the **Earn Code** field look-up icon. An earnings code not valid for the Employee Type (Hourly vs Salaried) will create an error when the **Validate** button is clicked.

**Note:** For a listing of Earnings Codes, see the job aid titled **PY381: Earnings Codes** located on the Cardinal Website in **Job Aids** under **Learning**.

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The **Detail Data** tab refreshes.

Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method	Oth Hrs	Hourly Rate	Amount
Active	MLG 	Mileage	12/25/2021 	01/09/2022 	1	Annualized			200.00

id:

cor:

15. Verify the **Description** field correctly auto-populated based off the selected Earnings Code.
16. Enter the appropriate Earnings Beginning and End Dates using the **Earns Begin Dt** and **Earns End Dt** calendar icons. These are required fields for all pay periods. If left blank, an error will occur when the **Validate** button is clicked.

17. The **Tax Periods** field defaults to "1" and refers to the number of pay periods covered by the earnings payment.

**Note:** The **Tax Periods** field is used in conjunction with the annualized tax method.

18. Select the appropriate Tax Method using the **Tax Method** field drop-down menu.

**Note:** Annualized and Supplemental are the most frequently used tax methods. The **Annualized** Tax Method multiplies the earnings by the pay periods and taxed based upon the annualized amount. (The **Tax Period** field impacts how the earnings are annualized). The **Supplemental** Tax Method is most often used for bonus payments and leave payouts and should **not** be used for earnings related to hours worked. See the job aid titled **PY381: Earnings Code** for a list of earning codes that use the supplemental tax method. The job aid is located on the Cardinal Website in **Job Aids** under **Learning**.

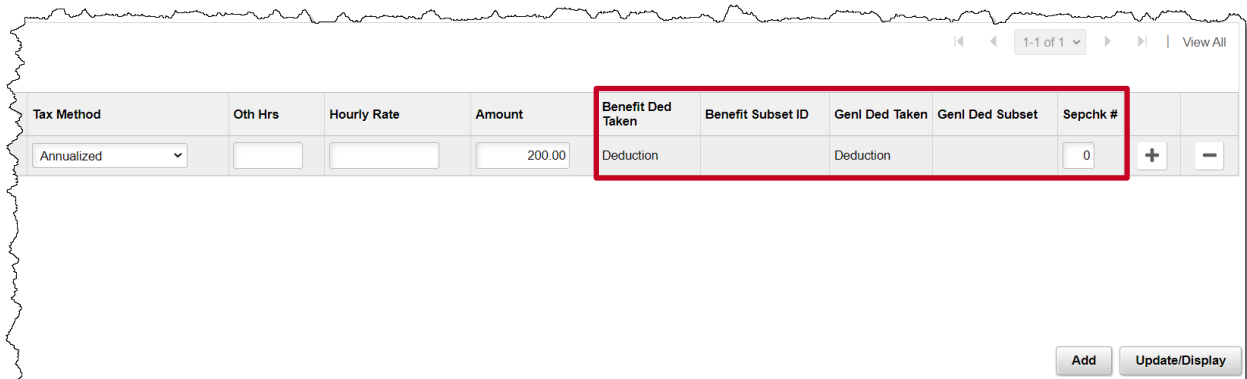
19. Enter the applicable hours in the **Oth Hrs** field to one decimal place (e.g., 8.0).
20. Enter the applicable hourly rate in the **Hourly Rate** field to two decimal places (e.g., 22.55).
21. Enter the applicable amount in the **Amount** field to two decimal places (e.g., 200.00). The amount can be a positive or negative number, based upon the value selected in the **Earn Code** field.

**Note:** The **Oth Hrs**, **Hourly Rate**, and **Amount** fields are available only if applicable based upon the value selected in the **Earn Code** field.

22. Scroll to the right, as required.

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The remaining fields on the **Detail Data** tab display.

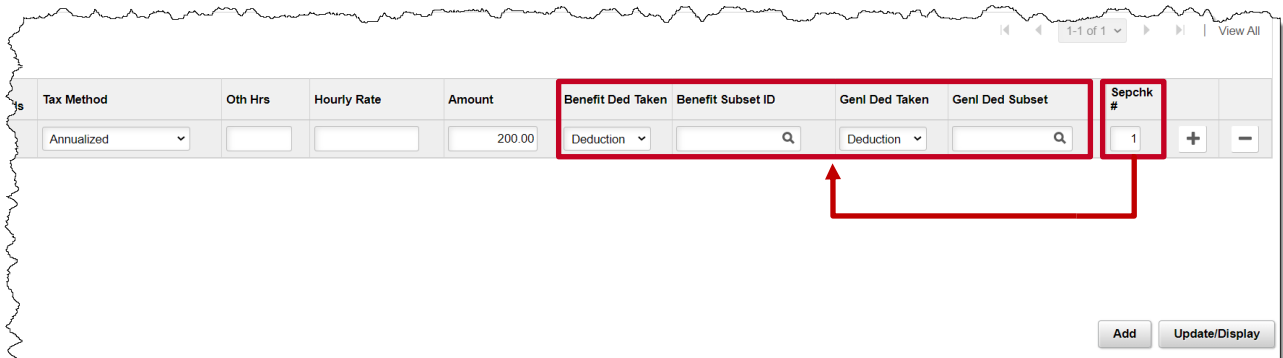


Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #
Annualized			200.00	Deduction		Deduction		0

23. The Benefit Ded Taken, Benefit Subset, Genl Ded Taken and Genl Ded Subset fields are not enabled. Entry of these fields is triggered based on the value in the **Sepchk#** field. See steps 25 – 28 for details on these fields.
24. The **Sepchk#** field defaults to “0”, indicating the earnings will be added to the employee’s regular check for the pay period being processed. Incrementally update this field by one if the employee requires a separate check(s).

**Note:** When deductions need to be modified on the separate check, you will need to enter a SPOT deduction batch using the corresponding separate check value and make the adjustments. See page 23 of this job aid for more details.



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**Note:** When the **Sepchk#** field value is changed from the default of 0, the **Benefit Ded Taken**, **Benefit Subset ID**, **Genl Ded Taken** and **Genl Ded Subset** fields become enabled and are required to be completed.

Follow the steps below to make the appropriate updates to each of these fields.

25. Select the appropriate value from the **Benefit Ded Taken** drop-down menu.
  - a. **Deduction** – all benefit deductions are taken from the earnings
  - b. **None** – no benefit deductions are taken from the earnings
  - c. **Subset** – a subset of benefit deductions is taken from the earnings

**Note:** A Benefit Subset ID value must be selected in the **Benefit Subset ID** field if the “**Subset**” value is selected in the **Benefit Ded Taken** field. If “**Subset**” was not selected, do not select a value in the **Benefit Subset ID** field and skip to step 27.

26. Enter/select a value using the **Benefit Subset ID** field look-up icon.
  - a. **BNS** (Bonus) – Annuity and Deferred Compensation deductions will be taken from the earnings.
  - b. **GRN** (Garnishment Only) – Garnishment and Garnishment fee deductions will be taken.
  - c. **SPT** (SPOT Allow) – Not used by Cardinal.
  - d. **LVS** (Leave Share) – All deductions will be taken from the earnings.

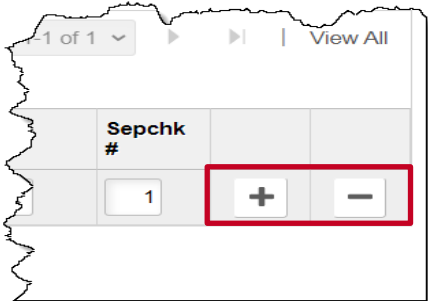
27. Select a value from the **Genl Ded Taken** field drop-down menu.
  - a. **Deduction** – all benefit deductions are taken from the earnings.
  - b. **None** – no benefit deductions are taken from the earnings.
  - c. **Subset** – a subset of benefit deductions is taken from the earnings.

**Note:** A General Deduction Subset value must be selected in the **Gen Ded Subset** field if the “**Subset**” value is selected in the **Genl Ded Taken** field. If “**Subset**” was not selected, do not select a value in the **Gen Ded Subset** field and skip to step 28.

28. Enter/select a value using the **Gen Ded Subset** field look-up icon.
  - a. **BNS** (Bonus) – Annuity and Deferred Compensation deductions will be taken from the earnings.

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- b. **GRN** (Garnishment Only) – Garnishment and Garnishment fee deductions will be taken.
- c. **SPT** (SPOT Allow) – Not used by Cardinal.
- d. **LVS** (Leave Share) – All deductions will be taken from the earnings.



- 29. Click the **Add a Row** icon (+) to add an additional item. Repeat steps 5 – 28 until all SPOT earnings transactions have been entered into the batch.
- 30. Click the **Delete a Row** icon (-) to delete a line.
- 31. Scroll to the left, as required.

Enter Payroll SPOT Trans

Company

ABC Alcoholic Beverage Control

Batch Id

NEXT

Pay Group

SM1 Semimonthly Class (FR/THU07)

Created By

Pay Period End

01/09/2022

Submitted By

Transaction Type

Earnings

Approved By

Batch Status

New

Modified By

Totals (only for Valid rows)

Total Amt :

Total Hrs :

Attach Files

Upload Files

Process Monitor

Detail Data

Validation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns
1		1		0		Active	MLG	Mileage	12/25/2021	01/09/2022

Validate

Submit

\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:

Rows Error:

Total Rows:

Save

- 32. Click the **Save** button.
- The **Enter SPOT Transactions** page refreshes.

## PY381 Using the Single-Use Payroll Online Tool (SPOT)

Enter Payroll SPOT Trans

Company

ABC Alcoholic Beverage Control

Batch Id

104

Pay Group

SM1 Semimonthly Class (FRITHU07)

Created By

Pay Period End

01/09/2022

Submitted By

Transaction Type

Earnings

Approved By

Batch Status

Created

Modified By

Totals (only for Valid rows)

Total Amt :

Total Hrs :

Attach Files

Upload Files

Process Monitor

Detail Data

Validation

III>

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MLG	Mileage	12/25/2021

Validate

Submit

\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:

Rows Error:

Total Rows:

Save

**Note:** After a batch is saved, additional items can still be added as necessary.

33. Verify the **Batch ID** field populates with a number (“**104**” in the example above).
34. Verify the **Batch Status** field updates to “**Created**”.
35. Click the **Validate** button to validate individual fields as well as combinations of fields.



## PY Job Aid

### PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.

**Enter Payroll SPOT Trans**

Company: ABC Alcoholic Beverage Control  
Pay Group: SM1 Semimonthly Class (FR/THU07)  
Pay Period End: 01/09/2022  
Transaction Type: Earnings  
Batch Status: Validated  
Batch Id: 104  
Created By:   
Submitted By:   
Approved By:   
Modified By:

**Totals (only for Valid rows)**  
Total Amt : 200.00  
Total Hrs :

Attach Files Upload Files Process Monitor

**Detail Data** Validation II»

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt
1	1	C	0		Active	MLG	Mileage	12/25/2021	01/09/2022

**Validate** **Submit**

\*\*Total Hours & Amount are updated on Validation  
\*\*Valid Row and Error Row Count are updated on Validation

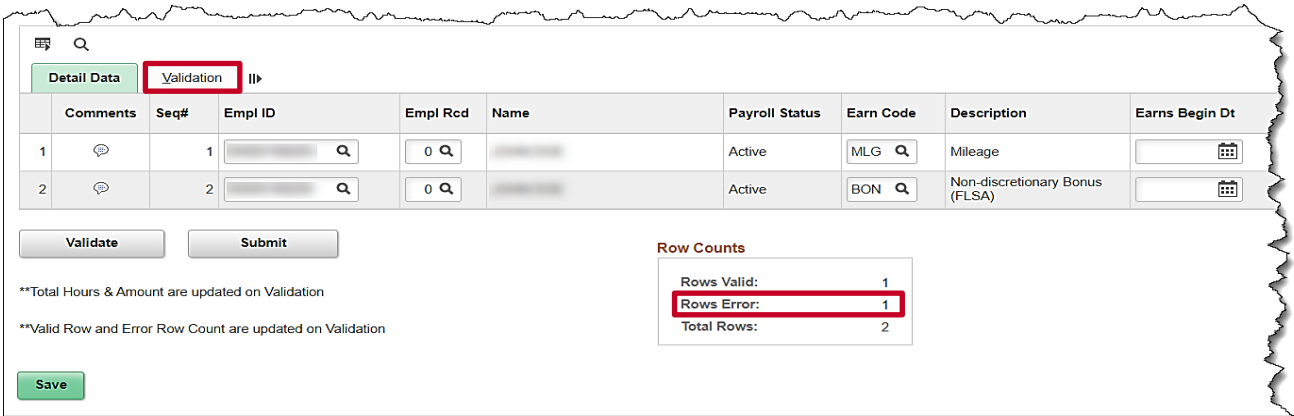
**Row Counts**  
Rows Valid: 1  
Rows Error:   
Total Rows: 1

**Save**

36. The **Batch Status** updates to **Validated**.
37. The **Totals (only for Valid rows)** section provides a summary of:
  - a. **Total Amt** – sum of the values entered in the **Amount** field for the batch
  - b. **Total Hrs** – sum of the values entered in the **Oth Hrs** field for the batch
38. The **Row Counts** section provides a summary of:
  - a. **Rows Valid** – the number of valid rows in the batch
  - b. **Rows Error** – the number or rows in the batch containing errors
  - c. **Total Rows** – total number of rows in the batch (sum of **Rows Valid** and **Rows Error** fields)
39. If the **Rows Error** field is blank, indicating all rows are valid, skip to Step 49.

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The screenshot below provides an example of a batch that contains an error.



**Detail Data** **Validation** II>

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MLG	Mileage	
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	

**Validate** **Submit**

\*\*Total Hours & Amount are updated on Validation  
\*\*Valid Row and Error Row Count are updated on Validation

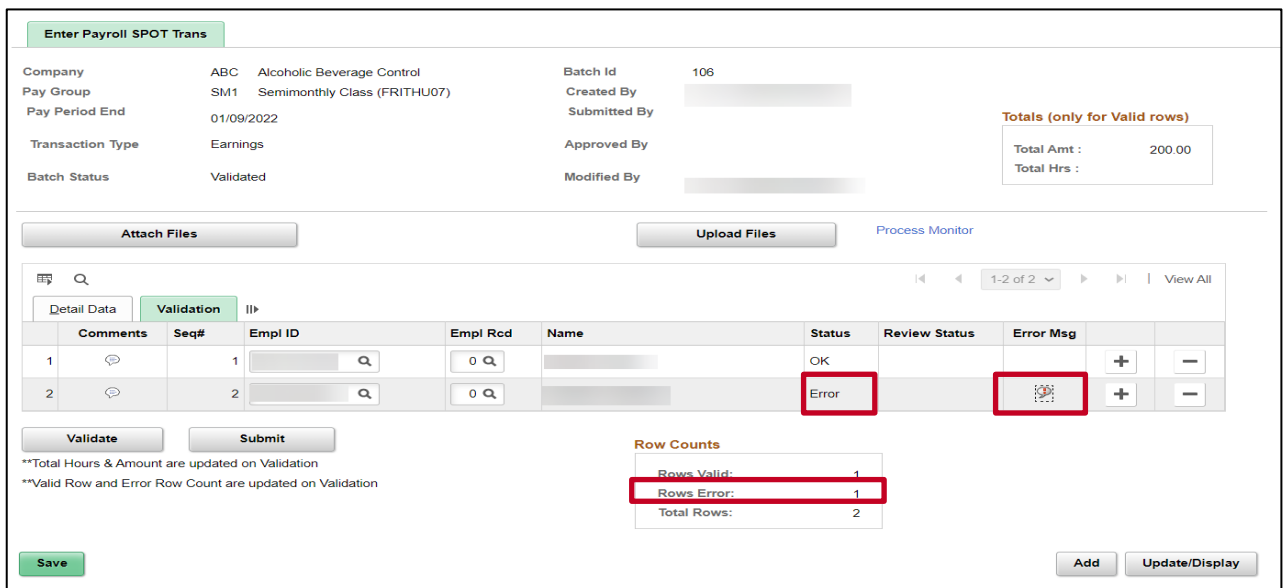
**Save**

**Row Counts**

Rows Valid:	1
Rows Error:	1
Total Rows:	2

40. If the **Rows Error** field populates with a number, indicating at least one row is not valid, click the **Validation** tab.

The **Validation** tab displays.



**Enter Payroll SPOT Trans**

Company: ABC Alcoholic Beverage Control Batch Id: 106  
 Pay Group: SM1 Semimonthly Class (FRITHU07) Created By:   
 Pay Period End: 01/09/2022 Submitted By:   
 Transaction Type: Earnings Approved By:   
 Batch Status: Validated Modified By:

**Totals (only for Valid rows)**

Total Amt : 200.00  
Total Hrs :

**Attach Files** **Upload Files** [Process Monitor](#)

**Detail Data** **Validation** II>

	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1		1		0		OK			+	-
2		2		0		Error			+	-

**Validate** **Submit**

\*\*Total Hours & Amount are updated on Validation  
\*\*Valid Row and Error Row Count are updated on Validation

**Save**

**Row Counts**

Rows Valid:	1
Rows Error:	1
Total Rows:	2

**Add** **Update/Display**

- The **Validation** tab displays the status of every line within a batch and an error message for lines that are not valid.
  - The **Status** field displays one of two statuses:
    - **OK** – no errors
    - **Error** – issue with line
  - If there is an error during validation, the **Row Counts** section displays the number of lines with an error in the **Rows Error** field, the **Status** field populates with “**Error**” for all lines containing an error, and a bubble populates in the **Error Msg** field for all lines containing an error.
41. Click the **Bubble** icon in the **Error Msg** field to view the error message.

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The **SPOT Review Notes Page** pop-up window displays.

**SPOT Review Notes page** ✕

[Help](#)

Empl ID            00055228800

Empl Record     0

Seq#             2

Notes            

Amount cannot be zero for Ern\_Cd- BON;

OK

Cancel

42. Read through the **Notes** field and click the **OK** button.

The **Validation** tab returns.

Enter Payroll SPOT Trans

Company            ABC    Alcoholic Beverage Control

Pay Group          SM1    Semimonthly Class (FRITHU07)

Pay Period End     01/09/2022

Transaction Type   Earnings

Batch Status       Validated

Batch Id            106

Created By         

Submitted By      

Approved By      

Modified By

Attach Files

Upload Files

Process Monitor

Detail Data

Validation

1-2 of 2

View All

	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1		1	<div style="border: 1px solid gray; width: 80px; height: 20px;"></div>	0	<div style="border: 1px solid gray; width: 100px; height: 20px;"></div>	OK			+	-
2		2	<div style="border: 1px solid gray; width: 80px; height: 20px;"></div>	0	<div style="border: 1px solid gray; width: 100px; height: 20px;"></div>	Error			+	-

Validate

Submit

**Row Counts**  
Rows Valid:            1  
Rows Error:            1  
Total Rows:            2

Save

Add

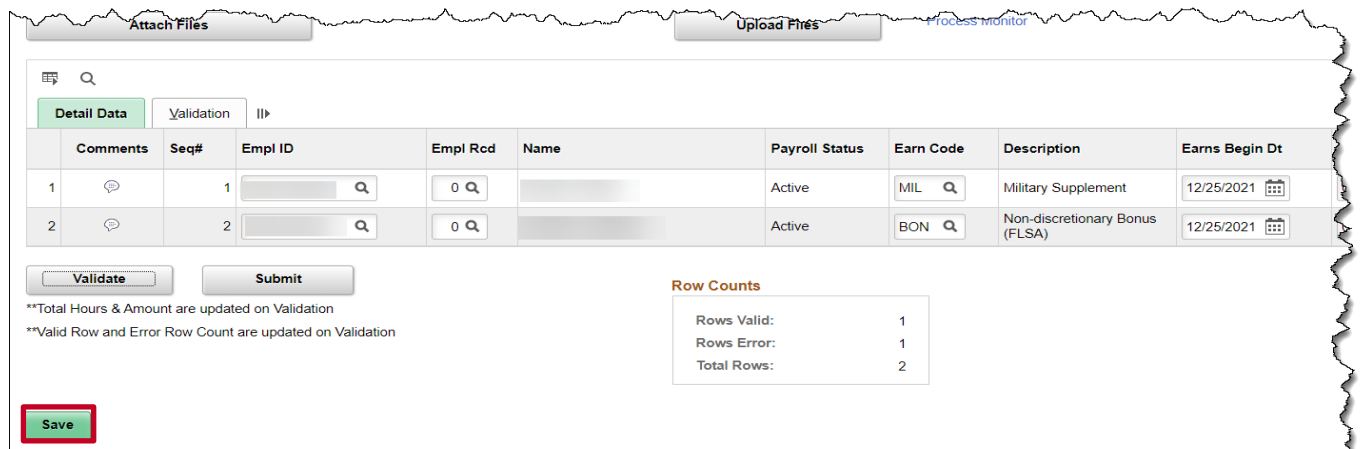
Update/Display

43. Click the **Detail Data** tab.

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The **Detail Data** tab returns.



Attach Files Upload Files Process Monitor

Detail Data Validation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MIL	Military Supplement	12/25/2021
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021

Validate Submit

\*\*Total Hours & Amount are updated on Validation  
\*\*Valid Row and Error Row Count are updated on Validation

Row Counts

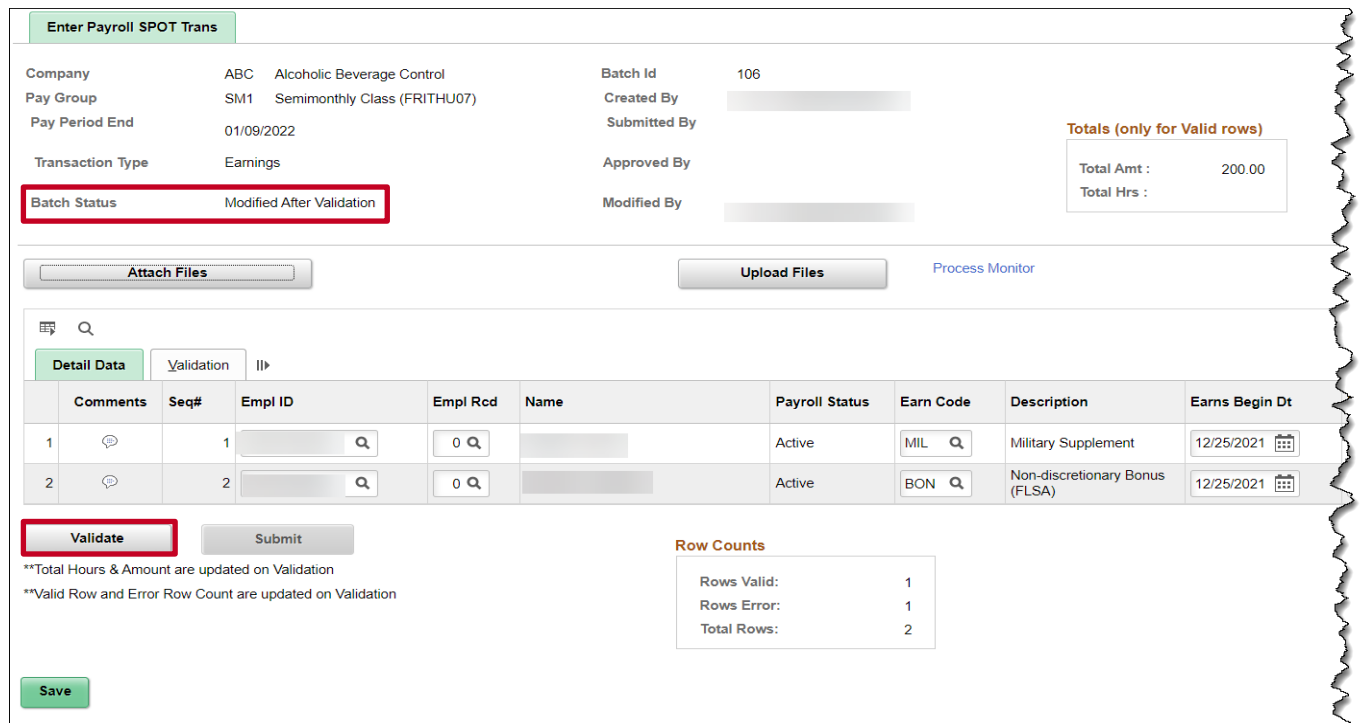
Rows Valid:	1
Rows Error:	1
Total Rows:	2

Save

44. Update the applicable fields to correct the identified errors.

45. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans

Company ABC Alcoholic Beverage Control Batch Id 106  
Pay Group SM1 Semimonthly Class (FRITHU07) Created By  
Pay Period End 01/09/2022 Submitted By  
Transaction Type Earnings Approved By  
Batch Status Modified After Validation Modified By

Totals (only for Valid rows)

Total Amt :	200.00
Total Hrs :	

Attach Files Upload Files Process Monitor

Detail Data Validation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MIL	Military Supplement	12/25/2021
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021

Validate Submit

\*\*Total Hours & Amount are updated on Validation  
\*\*Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:	1
Rows Error:	1
Total Rows:	2

Save

**Note:** All line items in a batch must pass validation before the batch can be submitted for approval. The **Submit** button is not enabled until all lines are validated successfully.

46. Verify the **Batch Status** field updates to "**Modified After Validation**".

47. Click the **Validate** button.

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company: ABC Alcoholic Beverage Control

Pay Group: SM1 Semimonthly Class (FRITHU07)

Pay Period End: 01/09/2022

Transaction Type: Earnings

**Batch Status: Validated**

Batch Id: 106

Created By: [ ]

Submitted By: [ ]

Approved By: [ ]

Modified By: [ ]

**Totals (only for Valid rows)**

Total Amt : 380.00

Total Hrs : [ ]

Attach Files

Upload Files

[Process Monitor](#)

Detail Data

Validation

III▶

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1	🗨	1	[ ]	0	[ ]	Active	MIL	Military Supplement	12/25/2021
2	🗨	2	[ ]	0	[ ]	Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021

Validate

**Submit**

**Row Counts**

Rows Valid: 2

**Rows Error: [ ]**

Total Rows: 2

\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

Save

48. Verify the **Batch Status** field updates to “**Validated**”.
  49. Verify the **Rows Error** field is blank, indicating all errors have been fixed.
  50. Click the **Submit** button to submit the batch for review.
- A **Confirmation Message** displays in a pop-up window.

Are you sure you want to submit the Batch? (25200,36)

Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?

**OK**

Cancel

51. Click the OK button to submit the batch for review.

**Note:** A batch cannot be edited after it has been submitted.





## PY Job Aid

### PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page returns.

Enter Payroll SPOT Trans

CompanyABCAlcoholic Beverage Control

Pay GroupSM1Semimonthly Class (FRTHU07)

Pay Period End01/09/2022

Transaction TypeEarnings

Batch StatusSubmitted

Batch Id106

Created By

Submitted By

Approved By

Modified By

Totals (only for Valid rows)

Total Amt :380.00

Total Hrs :

Attach Files

Upload Files

Process Monitor

Detail DataValidation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MIL	Military Supplement	12/25/2021
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021

Validate

Submit

\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:2

Rows Error:

Total Rows:2

Save

Verify the **Batch Status** field updates to “**Submitted**”.

52. Verify the **Submitted By** field updates to your information.

## Enter a Deduction Transaction in SPOT

1. Navigate to the **Enter SPOT Transactions** page using the following path:

**Navigator > Payroll for North America > Payroll Process USA > Create and Load Paysheets > Enter SPOT Transactions**

### Enter SPOT Transactions

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Company

begins with ▼

Q

Pay Group

begins with ▼

Q

Pay Period End Date

= ▼

Q

Transaction Type

= ▼

▼

Batch Identity

begins with ▼

Batch Status

= ▼

▼

Created By

begins with ▼

Q


☐ Case Sensitive

Limit the number of results to (up to 300):

[Search](#)

[Clear](#)

[Basic Search](#)

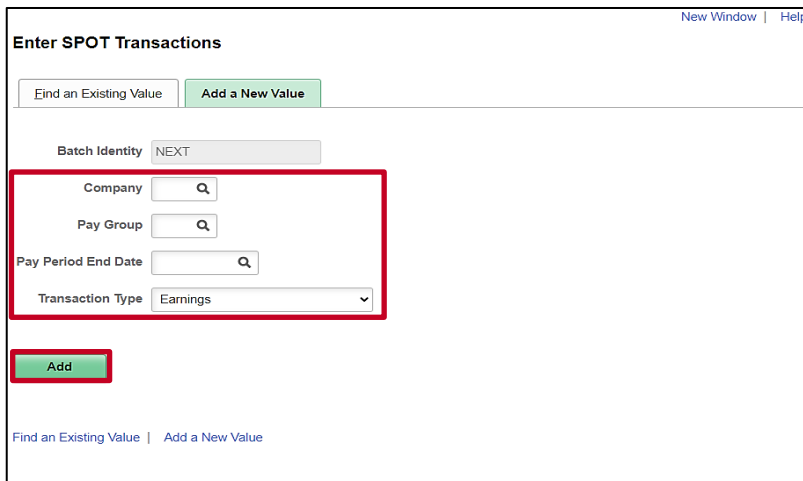
 [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

2. Click the **Add a New Value** tab.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Add a New Value** tab displays.



Enter SPOT Transactions New Window | Help

Find an Existing Value **Add a New Value**

Batch Identity

Company

Pay Group

Pay Period End Date

Transaction Type

**Add**

[Find an Existing Value](#) | [Add a New Value](#)

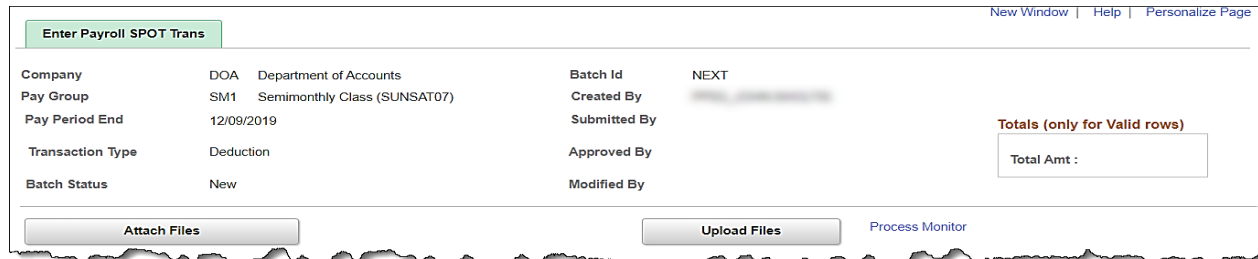
The following table provides a brief description of each field within the **Add a New Value** tab:

Field	Description
<b>Batch Identity</b>	Defaults to <b>NEXT</b> . This number will automatically generate when the batch is saved.
<b>Company</b>	Select your company. If you have access to enter transactions for multiple companies, select the appropriate company.
<b>Pay Group</b>	Select the appropriate employee(s) pay group(s). Employees entered in the SPOT batch must be in the Pay Group entered for the Pay Period selected. When you validate the batch, an error message displays indicating the employee is not in the Pay Group.
<b>Pay Period End Date</b>	Select the appropriate pay period end date for the transactions being entered (the pop-up window will only show pay periods that have not been confirmed).  When processing an Off-cycle transaction, use the pay period end date communicated by SPO.
<b>Transaction Type</b>	Select the appropriate type of transaction. <ul style="list-style-type: none"> <li><b>Earnings</b> – earnings in addition to time and labor or additional pay (typically one time or amounts that vary from pay period to pay period).</li> <li><b>Deductions</b> – deduction overrides, extra deductions, or deduction refunds.</li> </ul>

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

3. Enter/select the appropriate values in the **Company**, **Pay Group**, and **Pay Period End Date** fields.
4. Enter/select “**Deductions**” in the **Transaction Type** field.
5. Click the **Add** button.

The **Enter SPOT Transactions** page refreshes with the **Enter Payroll SPOT Trans** tab displayed.



**Note:** The **Header** section populates with the information previously entered on the **Add a New Value** tab.

The following table provides a brief description of additional fields included in the **Header** section of the **Enter Payroll SPOT Trans** tab:

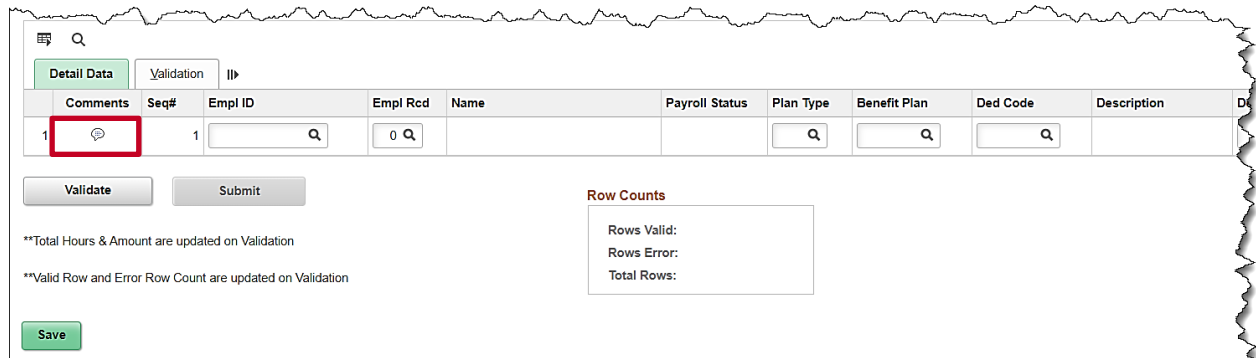
Field	Description
<b>Batch Status</b>	Updates based on actions taken to the batch. Batch statuses include: <ul style="list-style-type: none"> <li>• <b>New</b> – when a new batch is initiated</li> <li>• <b>Created</b> – when the batch is saved</li> <li>• <b>Validated</b> – when the batch is validated</li> <li>• <b>Modified after Validation</b> – when the batch is changed after validation</li> <li>• <b>Submitted</b> – when the batch is submitted for approval</li> <li>• <b>In Review</b> – when the approver is reviewing the batch for approval</li> <li>• <b>Closed</b> – after the approver has submitted the batch to payroll</li> </ul>
<b>Batch ID</b>	Defaults to “ <b>NEXT</b> ”; automatically updates when the batch is submitted.
<b>Created By</b>	Displays the name of the Payroll Administrator who created the batch.
<b>Submitted By</b>	Displays the name of the Payroll Administrator who submitted the batch.
<b>Approved By</b>	Displays the name of the SPOT approver who approved the batch.

**Note:** For further information on the **Attach Files** and **Upload Files** buttons, see the **Spreadsheet Upload** section of this Job Aid.

6. Scroll down to the **Detail Data** and **Validation** tabs below the Header section.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Detail Data** tab displays by default.

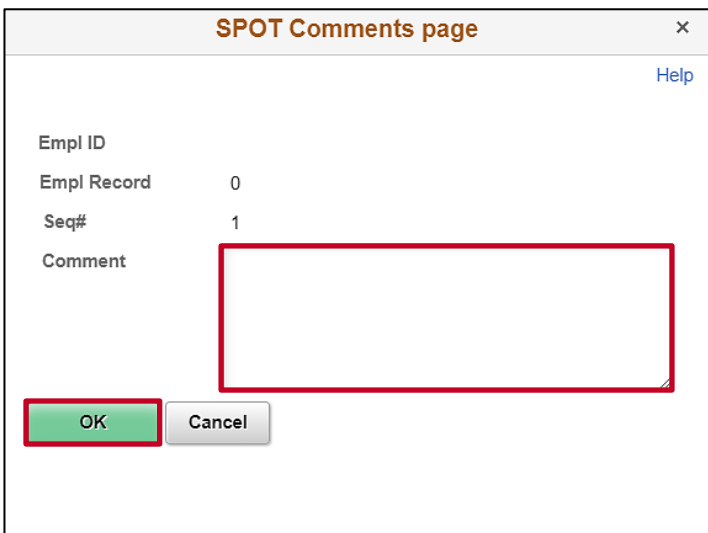


**Note:** Use the scroll bar at the bottom of the page to move left/right as required.

- a. The **Detail Data** tab is used for one-time transactions.
- b. The **Validation** tab is used to view the status of validated transactions.

7. Click the **Comments** bubble.

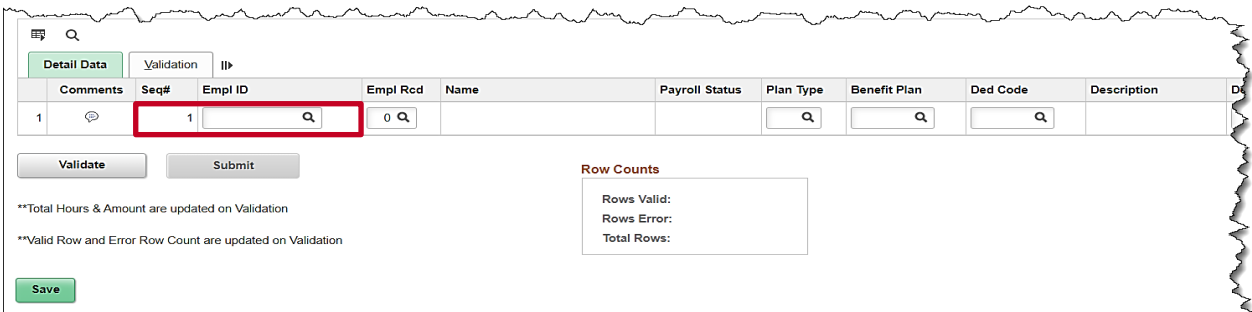
The **SPOT Comments** page displays in a pop-up window.



8. Enter any applicable comments in the **Comment** field, as required.
9. Click the **OK** button.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Detail Data** tab returns.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
1	1	1	0						

Validate Submit

\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

Save

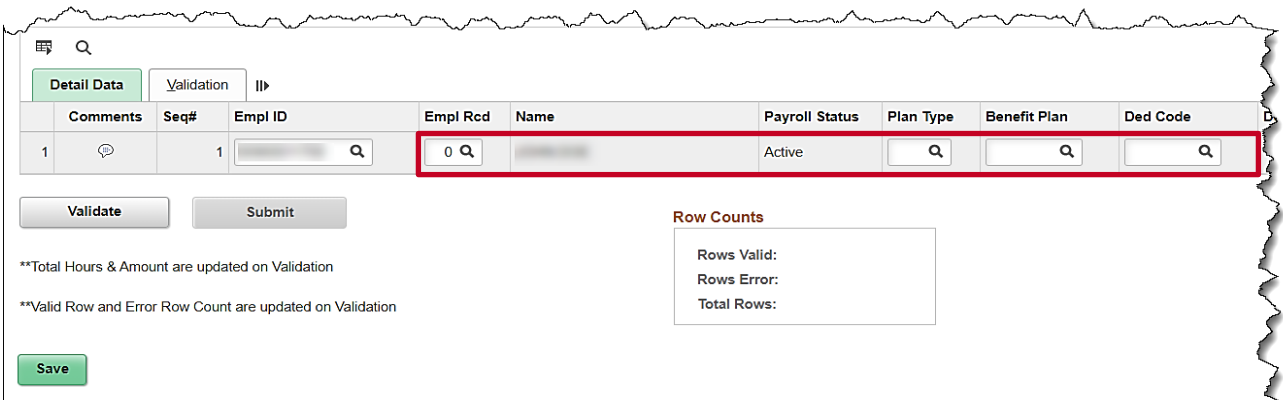
Row Counts

Rows Valid:  
Rows Error:  
Total Rows:

10. The **Seq#** field auto-populates and is read-only.

11. Enter/select the appropriate Employee ID using the **Empl ID** field look-up icon.

The **Detail Data** tab refreshes.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
1	1		0		Active				

Validate Submit

\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

Save

Row Counts

Rows Valid:  
Rows Error:  
Total Rows:

12. Enter/select the applicable Employee Record as required using the **Empl Rcd** field look-up icon.

13. Verify the auto-populated Name in the **Name** field.

14. Verify the Payroll Status in the **Payroll Status** field.

**Note:** A Paysheet is created for pending SPOT transactions during the SPOT load if the Payroll Status is **“Terminated”**.

15. Enter/select the appropriate Plan Type using the **Plan Type** field look-up icon.

**Note:** For detailed information about **Plan Type**, **Benefit Plan**, **Ded Code**, **Ded Class**, see the job aid titled **PY381: General and Benefit Deduction Codes**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Training**.

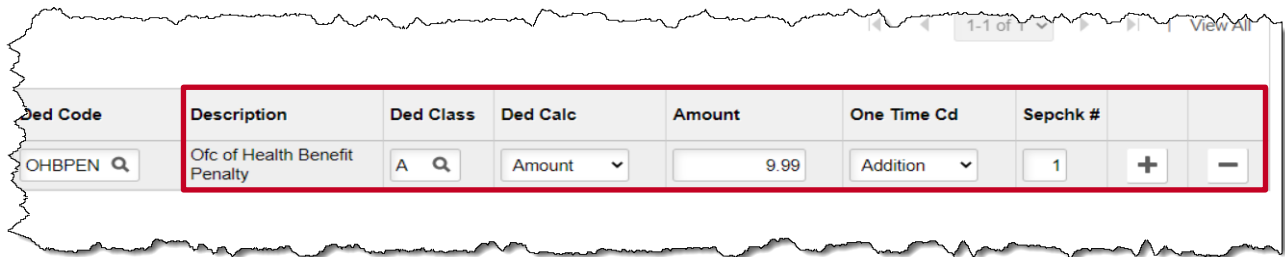
16. Enter/select the appropriate Benefit Plan using the **Benefit Plan** field look-up icon.

17. Enter/select the appropriate Deduction Code using the **Ded Code** field look-up icon.

a. **Note:** When the Validate button is clicked the Deduction Code selected will be verified as a valid code for the Benefit Plan selected. An error will occur if this is an invalid combination.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Detail Data** tab refreshes.



Ded Code	Description	Ded Class	Ded Calc	Amount	One Time Cd	Sepchk #		
OHPEN	Ofc of Health Benefit Penalty	A	Amount	9.99	Addition	1	+	-

18. Verify the auto-populated Deduction Code Description in the **Description** field.
19. Select the appropriate Deduction Classification using the **Ded Class** field look-up icon. The following values are available, but only valid values for the Deduction Code display:
  - a. Before-Tax
  - b. After-Tax
  - c. Non-Taxable
  - d. Tax Ben
  - e. Taxable
20. Select the appropriate Deduction Calculation option using the **Ded Calc** drop-down menu.
 

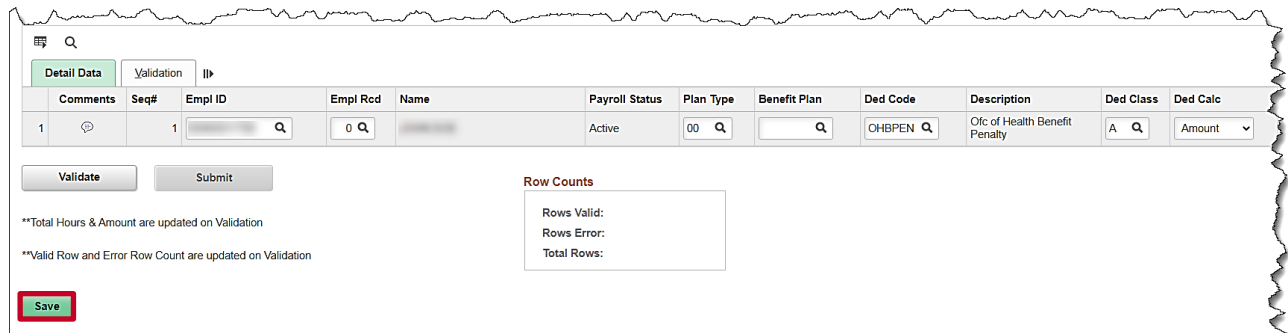
**Note:** The option “**Amount**” is typically selected. Confirm with SPO prior to selecting any Deduction Calculation option other than “**Amount**”.
21. Enter the appropriate Deduction Amount to two decimal places (e.g., 200.00) in the **Amount** field. The Deduction Amount can be either a positive or negative number.
22. Select the appropriate One Time Code using the **One Time Cd** drop-down menu. The following options are available
  - a. **Addition** – Add to the current deduction(s)
  - b. **Arres Paybk** – Not used by Cardinal
  - c. **Override** – Alter amount that would have been deducted
  - d. **Refund** – Amount due back to the employee; **DO NOT** enter a negative value in the **Amount** field if this option is selected
23. The **Sepchk#** field defaults to “0” indicating the deductions will be taken from the employee’s regular check for the pay period being processed.
 

For a separate check, the **Sepchk#** value will be greater than 0 and should correspond with the separate check number entered on the SPOT earnings batch. This will ensure that the deductions are taken from the correct check.

**Note:** An error will occur when the batch is validated if a SPOT deduction transaction for a Separate check is entered prior to entering the corresponding SPOT earnings transaction.
24. Click the **Add a Row** icon (+) to add an additional item and click the **Delete a Row** icon (-) to delete a line. Repeat steps 5 – 23 until all SPOT deduction transactions are added.

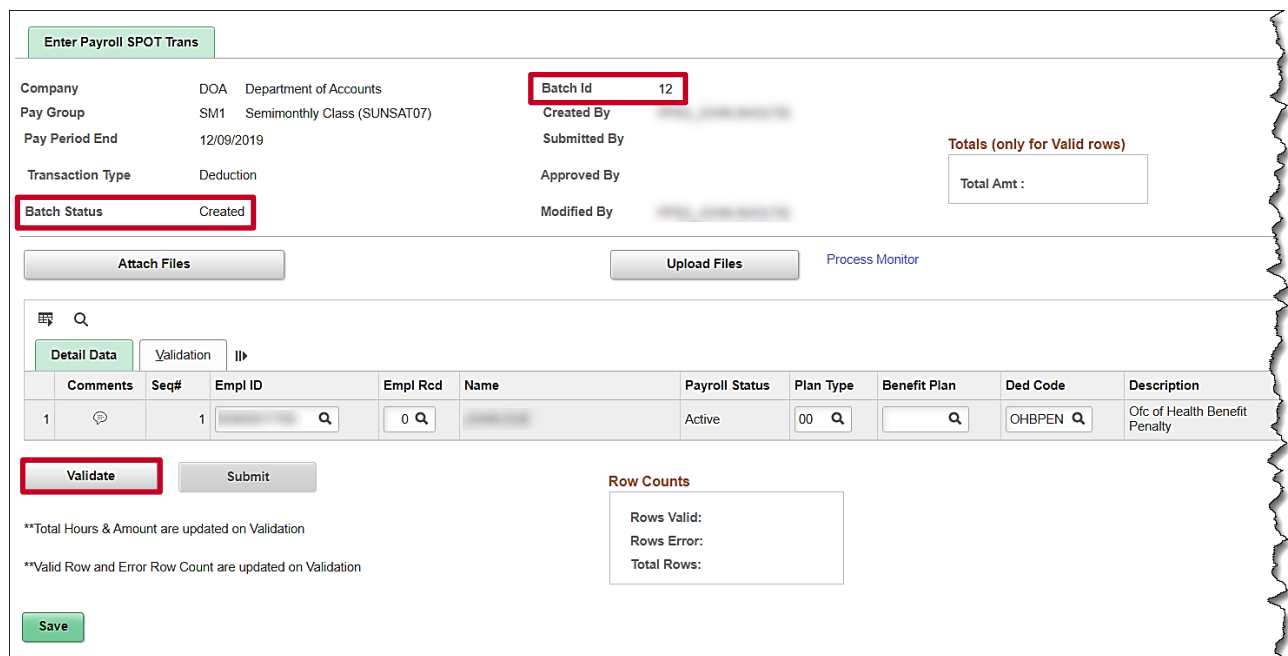
**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

25. Scroll to the left, as required.



26. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.



**Note:** After a batch is saved, additional items can still be added as necessary.

27. Verify the **Batch ID** field populates with a number (“12” in the example above).

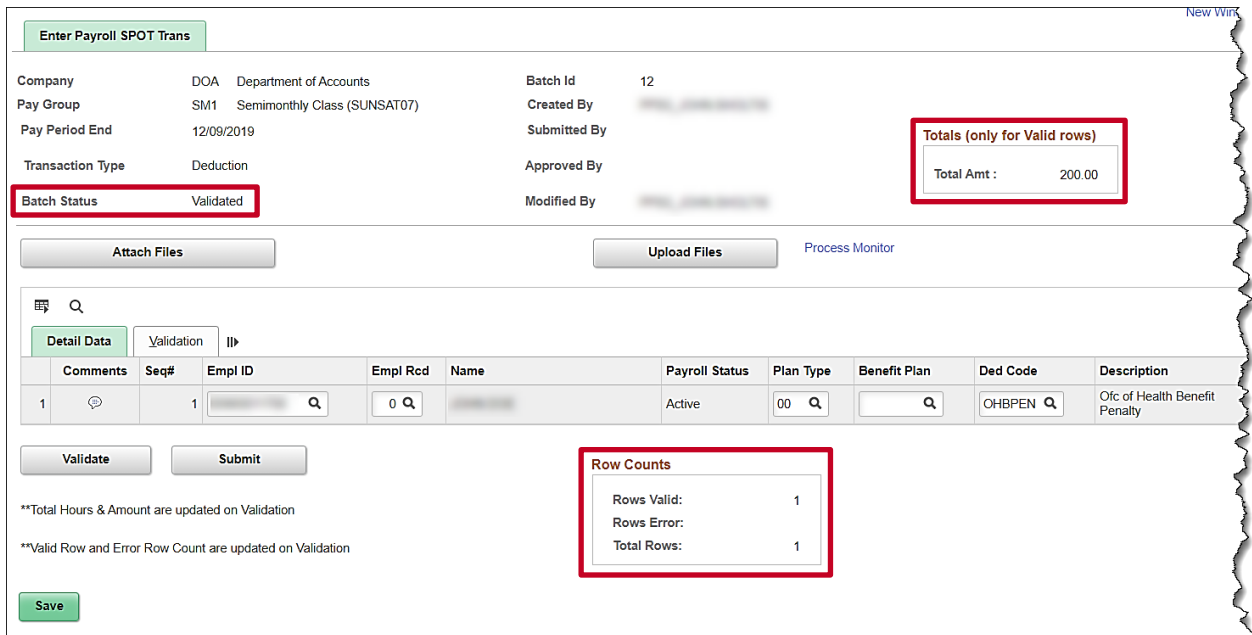
28. Verify the **Batch Status** field updates to “**Created**”.

29. Click the **Validate** button to validate individual fields as well as combinations of fields.



**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Enter SPOT Transactions** page refreshes.



**Enter Payroll SPOT Trans**

Company: DOA Department of Accounts      Batch Id: 12  
 Pay Group: SM1 Semimonthly Class (SUNSAT07)      Created By: [Redacted]  
 Pay Period End: 12/09/2019      Submitted By: [Redacted]  
 Transaction Type: Deduction      Approved By: [Redacted]  
 Batch Status: **Validated**      Modified By: [Redacted]

**Totals (only for Valid rows)**  
 Total Amt : 200.00

Attach Files      Upload Files      Process Monitor

**Detail Data**      Validation      II>

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
	1	[Redacted]	0	[Redacted]	Active	00		OHPBEN	Ofc of Health Benefit Penalty

Validate      Submit

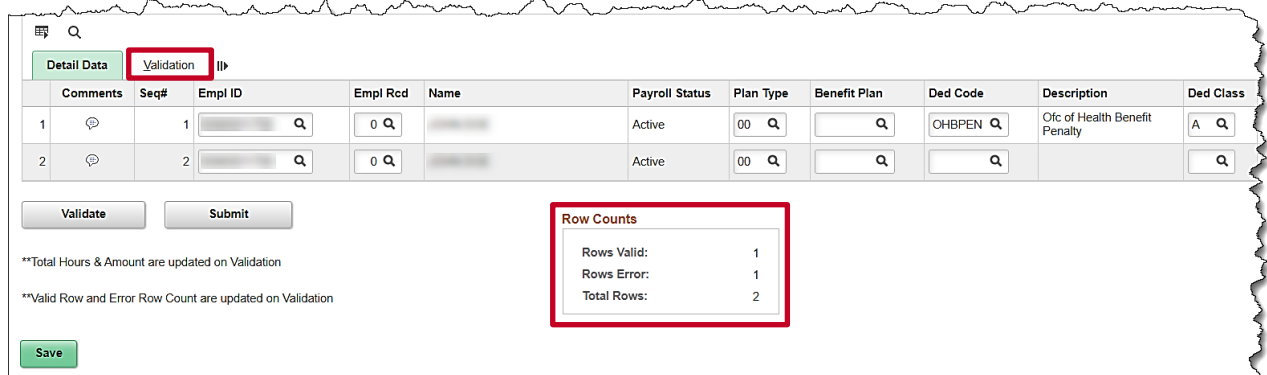
**Row Counts**  
 Rows Valid: 1  
 Rows Error:   
 Total Rows: 1

\*\*Total Hours & Amount are updated on Validation  
 \*\*Valid Row and Error Row Count are updated on Validation

Save

30. Verify the **Batch Status** updated to **Validated**.
31. The **Totals (only for Valid rows)** section provides a summary of the sum of the values entered in the **Amount** field for the batch.
32. The **Row Counts** section provides a summary of:
  - a. **Rows Valid** – the number of valid rows in the batch
  - b. **Rows Error** – the number or rows in the batch containing errors
  - c. **Total Rows** – total number of rows in the batch (sum of **Rows Valid** and **Rows Error** fields)
33. If the **Rows Error** field is blank, indicating all rows are valid, skip to Step 43.

The screenshot below provides an example of a batch that contains an error.



**Detail Data**      **Validation**      II>

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class
	1	[Redacted]	0	[Redacted]	Active	00		OHPBEN	Ofc of Health Benefit Penalty	A
	2	[Redacted]	0	[Redacted]	Active	00				

Validate      Submit

**Row Counts**  
 Rows Valid: 1  
 Rows Error: 1  
 Total Rows: 2

\*\*Total Hours & Amount are updated on Validation  
 \*\*Valid Row and Error Row Count are updated on Validation

Save

34. If the **Rows Error** field populates with a number, indicating at least one row is not valid, click the **Validation** tab.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Validation** tab displays.

[New Window](#) | [Help](#) | [Personalize Page](#)

Enter Payroll SPOT Trans

Company	DOA Department of Accounts	Batch Id	12
Pay Group	SM1 Semimonthly Class (SUNSAT07)	Created By	
Pay Period End	12/09/2019	Submitted By	
Transaction Type	Deduction	Approved By	
Batch Status	Validated	Modified By	

**Totals (only for Valid rows)**  

Total Amt : 200.00

Attach Files

Upload Files

[Process Monitor](#)

Detail Data

Validation

1-2 of 2

[View All](#)

Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1	1		0		OK			+	-
2	2		0		Error			+	-

Validate

Submit

**Row Counts**  

Rows Valid: 1  
**Rows Error: 1**  
Total Rows: 2

Save

Add

Update/Display

- The **Validation** tab displays the status of every line within a batch and an error message for lines that are not valid.
- The **Status** field displays one of two statuses:
  - **OK** – no errors
  - **Error** – issue with line
- If there is an error during validation, the **Row Counts** section displays the number of lines with an error in the **Rows Error** field, the **Status** field populates with “**Error**” for all lines containing an error, and a bubble populates in the **Error Msg** field for all lines containing an error.

35. Click the **Bubble** icon in the **Error Msg** field to view the error message.

Rev 3/17/2022

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**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **SPOT Review Notes Page** pop-up window displays.

**SPOT Review Notes page**
×

[Help](#)

Empl ID            00900011700  
 Empl Record      0  
 Seq#               2  
 Notes             

Deduction Code not selected ;Deduction Class not selected ;

OK

Cancel

36. Read through the **Notes** field and click the **OK** button.

The **Validation** tab returns.

[New Window](#) | [Help](#) | [Personalize Page](#)

Enter Payroll SPOT Trans

Company            DOA    Department of Accounts  
 Pay Group           SM1    Semimonthly Class (SUNSAT07)  
 Pay Period End      12/09/2019  
 Transaction Type    Deduction  
 Batch Status        Validated

Batch Id            12  
 Created By           [REDACTED]  
 Submitted By        [REDACTED]  
 Approved By        [REDACTED]  
 Modified By         [REDACTED]

**Totals (only for Valid rows)**  
 Total Amt :           200.00

Attach Files

Upload Files

[Process Monitor](#)

☰ Q
1-2 of 2
View All

Detail Data

Validation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1	💬	1	[REDACTED] Q	0 Q	[REDACTED]	OK			+	-
2	💬	2	[REDACTED] Q	0 Q	[REDACTED]	Error		🚫	+	-

Validate

Submit

**Row Counts**  
 Rows Valid:           1  
 Rows Error:           1  
 Total Rows:           2

\*\*Total Hours & Amount are updated on Validation  
 \*\*Valid Row and Error Row Count are updated on Validation

Save

Add

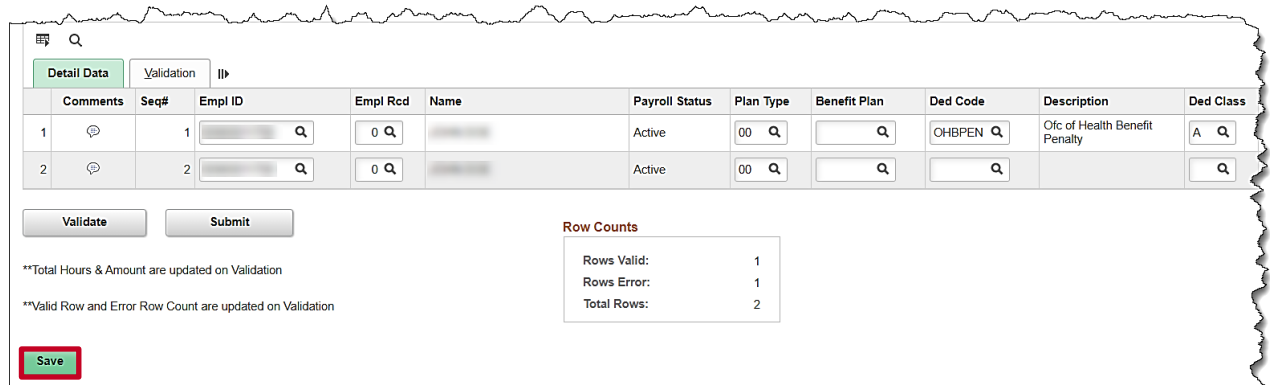
Update/Display

Rev 3/17/2022

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**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Detail Data** tab returns.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class
1	1		0		Active	00		OHBPEN	Ofc of Health Benefit Penalty	A
2	2		0		Active	00				

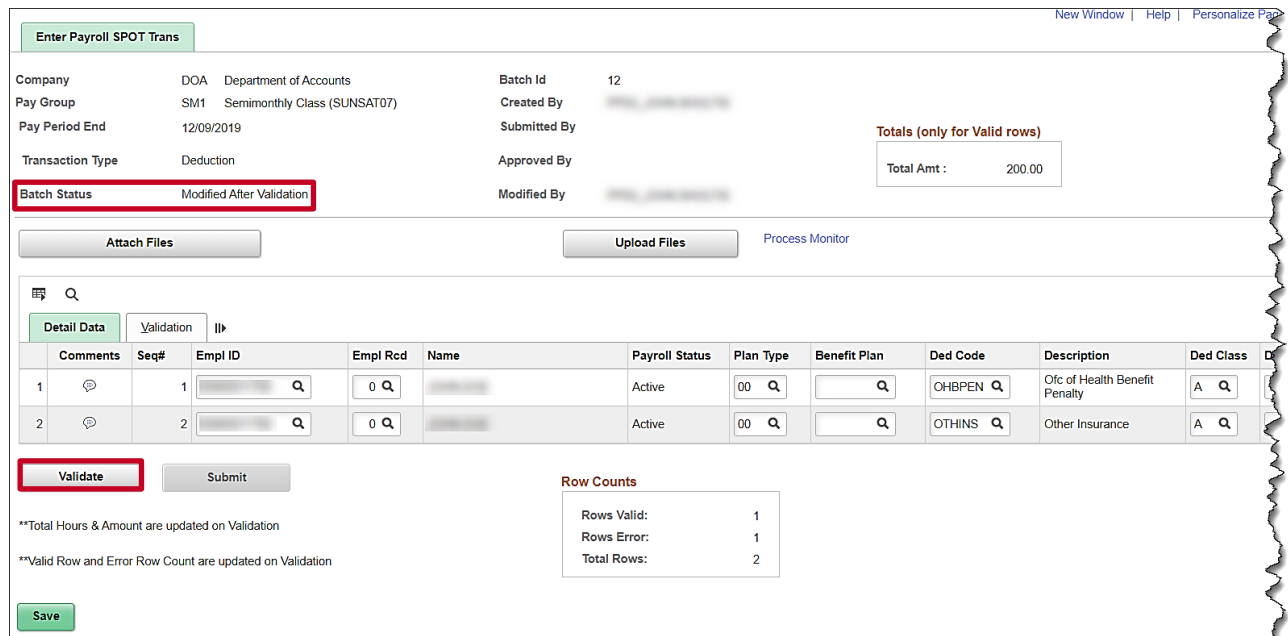
**Row Counts**  
 Rows Valid: 1  
 Rows Error: 1  
 Total Rows: 2

\*\*Total Hours & Amount are updated on Validation  
 \*\*Valid Row and Error Row Count are updated on Validation

37. Update the applicable fields to correct the identified errors.

38. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.



Company: DOA Department of Accounts  
 Pay Group: SM1 Semimonthly Class (SUNSAT07)  
 Pay Period End: 12/09/2019  
 Transaction Type: Deduction  
 Batch Id: 12  
 Created By: [Redacted]  
 Submitted By: [Redacted]  
 Approved By: [Redacted]  
 Modified By: [Redacted]

**Totals (only for Valid rows)**  
 Total Amt : 200.00

**Batch Status**: Modified After Validation

[Process Monitor](#)

**Detail Data** | Validation | II>

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class
1	1		0		Active	00		OHBPEN	Ofc of Health Benefit Penalty	A
2	2		0		Active	00		OTHINS	Other Insurance	A

**Row Counts**  
 Rows Valid: 1  
 Rows Error: 1  
 Total Rows: 2

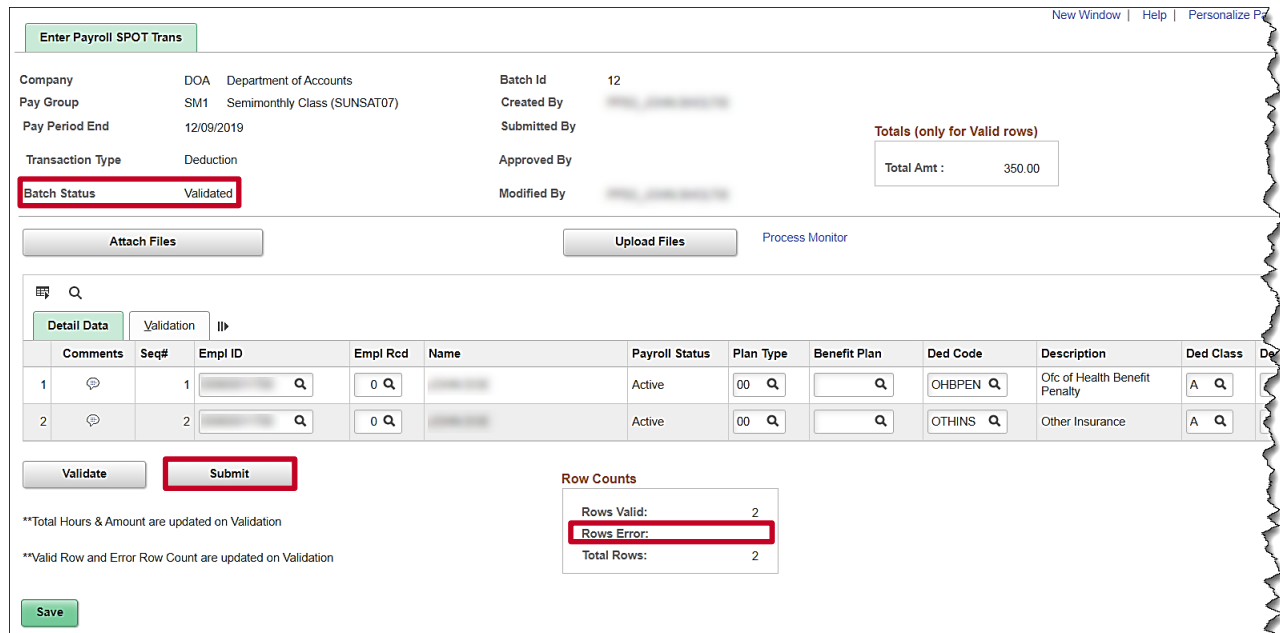
\*\*Total Hours & Amount are updated on Validation  
 \*\*Valid Row and Error Row Count are updated on Validation

**Note:** All line items in a batch must pass validation before the batch can be submitted for approval. The **Submit** button is not enabled until all lines are validated.

39. Verify the **Batch Status** field updates to "**Modified After Validation**".

40. Click the **Validate** button.

The **Enter SPOT Transactions** page refreshes.



**Enter Payroll SPOT Trans**

Company: DOA Department of Accounts Batch Id: 12  
 Pay Group: SM1 Semimonthly Class (SUNSAT07) Created By: [Redacted]  
 Pay Period End: 12/09/2019 Submitted By: [Redacted]  
 Transaction Type: Deduction Approved By: [Redacted]  
 Batch Status: **Validated** Modified By: [Redacted]

Totals (only for Valid rows)  
 Total Amt : 350.00

Attach Files Upload Files Process Monitor

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class
1	1	[Redacted]	0	[Redacted]	Active	00	[Redacted]	OHBPEN	Ofc of Health Benefit Penalty	A
2	2	[Redacted]	0	[Redacted]	Active	00	[Redacted]	OTHINS	Other Insurance	A

Validate **Submit**

Row Counts  
 Rows Valid: 2  
**Rows Error: 0**  
 Total Rows: 2

\*\*Total Hours & Amount are updated on Validation  
 \*\*Valid Row and Error Row Count are updated on Validation

Save

41. Verify the **Batch Status** field updates to “**Validated**”.
42. Verify the **Rows Error** field is blank, indicating all errors have been fixed.
43. Click the **Submit** button to submit the batch for review.

A **Confirmation Message** displays in a pop-up window.

Are you sure you want to submit the Batch? (25200,36)

Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?

44. Click the **OK** button to submit the batch for review.

**Note:** A batch cannot be edited after it is submitted.

The **Enter Spot Transactions** page returns.

[New Window](#) | [Help](#) | [Personalize Page](#)

Enter Payroll SPOT Trans

Company	DOA Department of Accounts	Batch Id	12
Pay Group	SM1 Semimonthly Class (SUNSAT07)	Created By	
Pay Period End	12/09/2019	<b>Submitted By</b>	
Transaction Type	Deduction	Approved By	
<b>Batch Status</b>	<b>Submitted</b>	Modified By	

**Totals (only for Valid rows)**  

Total Amt : 350.00

Attach Files

Upload Files

Process Monitor

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Ded
1				0		Active	00		OHBPEN	Ofc of Health Benefit Penalty	A	Am
2				0		Active	00		OTHINS	Other Insurance	A	Am

Validate

Submit

**Row Counts**  

Rows Valid: 2  
Rows Error:  
Total Rows: 2

\*\*Total Hours & Amount are updated on Validation  
\*\*Valid Row and Error Row Count are updated on Validation

Save

45. Verify the **Batch Status** field updates to “**Submitted**”.
46. Verify the **Submitted By** field updates to your information.

## PY381 Using the Single-Use Payroll Online Tool (SPOT)

## SPOT Template Upload Process

The SPOT Template Upload process can be used to enter a large volume of transactions into SPOT. There are two Template Uploads:

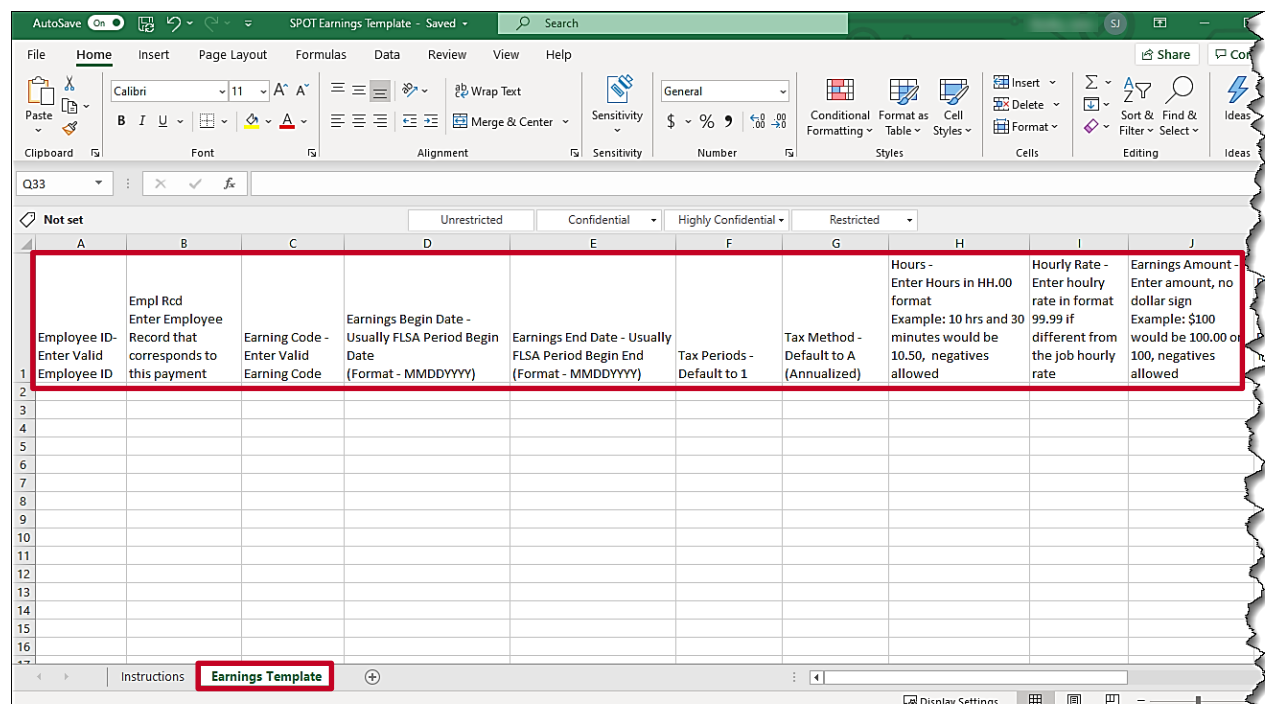
- Earnings
- Deductions

The templates are located on the Cardinal website.

**Note:** At this time, batches should not exceed more than 100 lines. If you have more than 100 lines to upload you will need to upload it as a separate batch.

1. Download and open the appropriate SPOT Upload Template. (The **SPOT Earnings Template** file is used in this example).

The **SPOT Earnings [or Deductions] Template** opens with the **Earnings [or Deductions] Template** workbook displayed by default.



2. Click the **Earnings [or Deductions] Template** workbook if it is not displayed by default.



## PY381 Using the Single-Use Payroll Online Tool (SPOT)

3. Enter the transactions starting in **Row 2** on the template following the instructions listed in the **Header Row (Row 1)**.

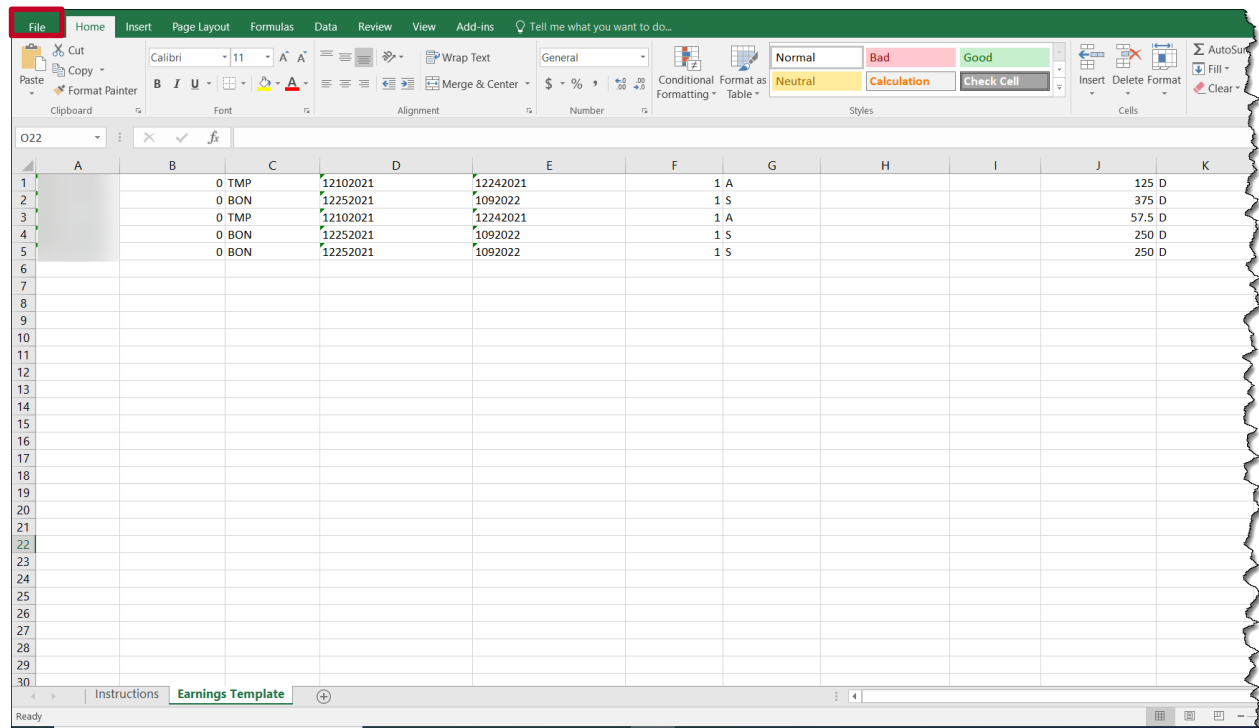
	A	B	C	D	E	F	G	H	I	J	K	L
	Employee ID - Enter Valid Employee ID	Empl Rcd - Enter Employee Record that corresponds to this payment	Earning Code - Enter Valid Earning Code	Earnings Begin Date - Usually FLSA Period Begin Date (Format - MMDDYYYY)	Earnings End Date - Usually FLSA Period End Date (Format - MMDDYYYY)	Tax Periods - Default to 1	Tax Method - Default to A (Annualized)	Hours - Enter Hours in HH.00 format Example: 10 hrs and 30 minutes would be 10.50, negatives allowed	Hourly Rate - Enter hourly rate in format 99.99 if different from the job hourly rate	Earnings Amount - Enter amount, no dollar sign Example: \$100 would be 100.00 or 100, negatives allowed	Take Benefit Deductions? D - Deductions Taken, N - No Deductions Taken, S - Use Subset	Enter Subset ID for Benefit Deductions if Benefit Deductions Taken = S
1												
2			0 TMP	12102021	12242021		1 A			125 D		
3			0 BON	12252021	1092022		1 S			375 D		
4			0 TMP	12102021	12242021		1 A			57.5 D		
5			0 BON	12252021	1092022		1 S			250 D		
6			0 BON	12252021	1092022		1 S			250 D		

4. Use the mouse or track pad and right click in cell labeled “1” to select the entire **Header** row.

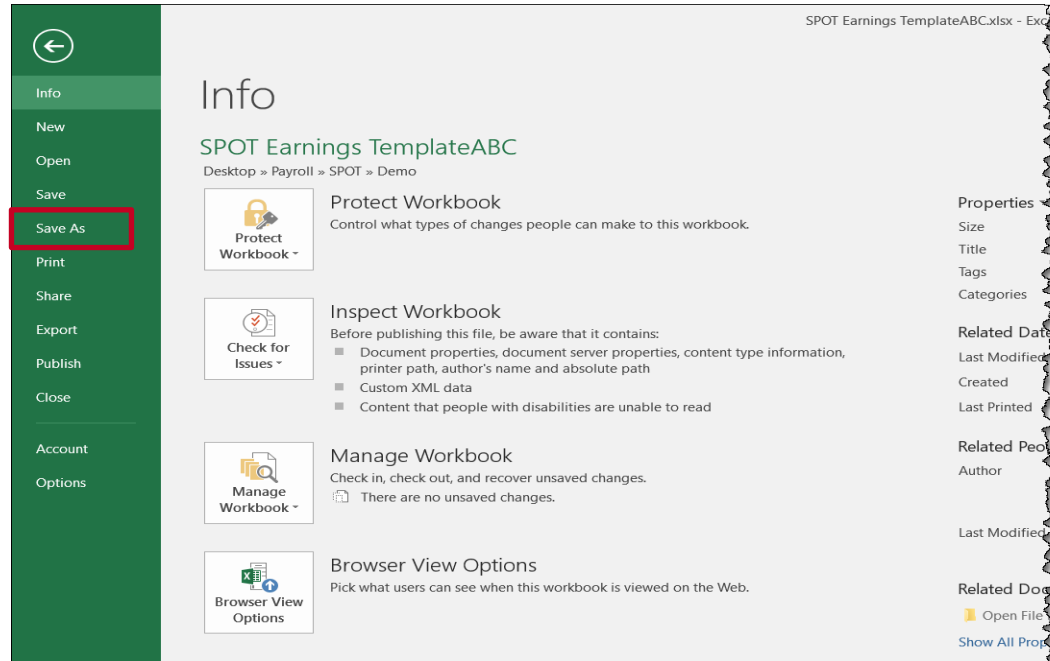
	A	B	C	D	E	F	G	H	I	J	K	L
	Employee ID - Enter Valid Employee ID	Empl Rcd - Enter Employee Record that corresponds to this payment	Earning Code - Enter Valid Earning Code	Earnings Begin Date - Usually FLSA Period Begin Date (Format - MMDDYYYY)	Earnings End Date - Usually FLSA Period End Date (Format - MMDDYYYY)	Tax Periods - Default to 1	Tax Method - Default to A (Annualized)	Hours - Enter Hours in HH.00 format Example: 10 hrs and 30 minutes would be 10.50, negatives allowed	Hourly Rate - Enter hourly rate in format 99.99 if different from the job hourly rate	Earnings Amount - Enter amount, no dollar sign Example: \$100 would be 100.00 or 100, negatives allowed	Take Benefit Deductions? D - Deductions Taken, N - No Deductions Taken, S - Use Subset	Enter Subset ID for Benefit Deductions if Benefit Deductions Taken = S
1												
2			0 TMP	12102021	12242021		1 A			125 D		
3			0 BON	12252021	1092022		1 S			375 D		
4			0 TMP	12102021	12242021		1 A			57.5 D		
5			0 BON	12252021	1092022		1 S			250 D		
6			0 BON	12252021	1092022		1 S			250 D		

5. Click the **Delete** option from the drop-down menu to delete the entire **Header** row.



**PY381 Using the Single-Use Payroll Online Tool (SPOT)**


5. Click the **File** button from the Ribbon.

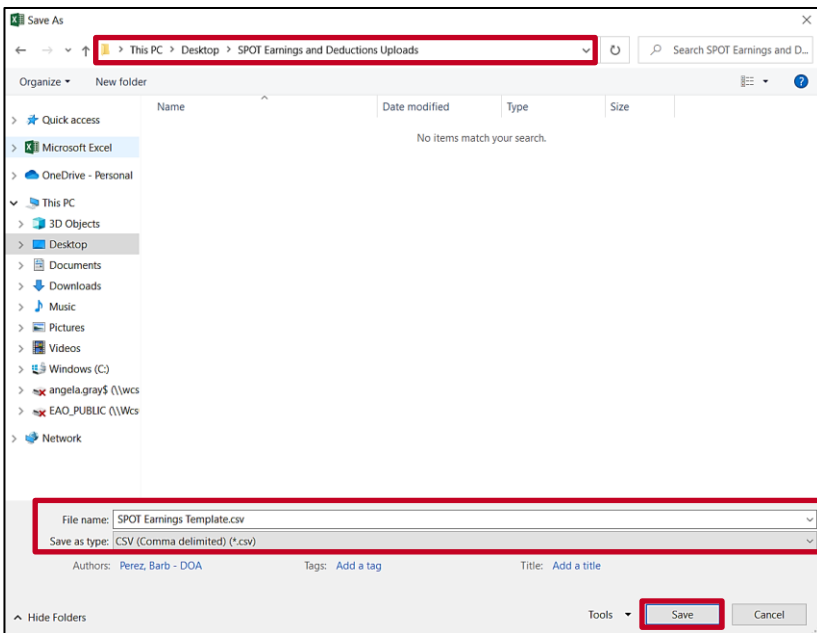


6. Click the **Save a Copy** or **Save As** button.

**Note:** The button name depends upon the version of Microsoft Excel and personalized settings loaded on your computer, but the functionality is the same.

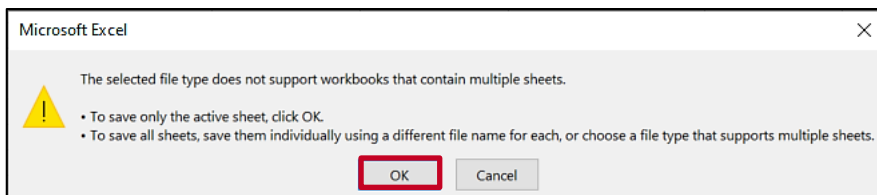
**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Save As** pop-up window displays.



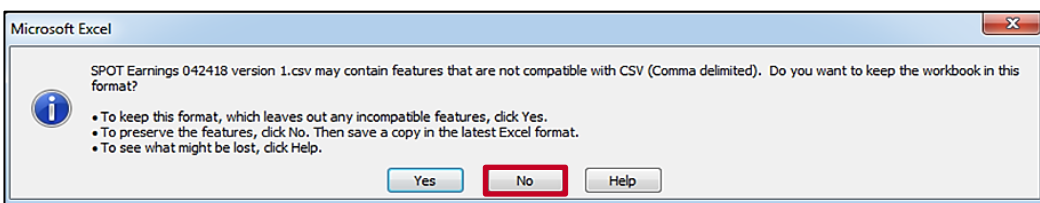
7. Select a destination using the Save Destination drop-down menu.
8. Enter a unique name for the file in the **File name** field.
9. Select **CSV (Comma Delimited)** from the **Save as type** drop-down menu.
10. Click the **Save** button.

A **Microsoft Excel Warning Message** displays.



11. Click the **OK** button.

A second **Microsoft Excel Warning Message** displays.



12. Click the **No** button.

**Note:** The file is now saved and ready to be uploaded.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

13. Navigate to the **Enter SPOT Transactions** page using the following path:

**Navigator > Payroll for North America > Payroll Process USA > Create and Load Paysheets > Enter SPOT Transactions**

### Enter SPOT Transactions

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

**Search Criteria**

Company

Pay Group

Pay Period End Date

Transaction Type

Batch Identity

Batch Status

Created By

☐ Case Sensitive

Limit the number of results to (up to 300):

[Basic Search](#)
[Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

14. Click the **Add a New Value** tab.

### Enter SPOT Transactions

[New Window](#) | [Help](#)

[Find an Existing Value](#)
[Add a New Value](#)

Batch Identity

Company

Pay Group

Pay Period End Date

Transaction Type

[Find an Existing Value](#) | [Add a New Value](#)

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The following table provides a brief description of each field within the **Add a New Value** tab:

Field	Description
<b>Batch Identity</b>	Defaults to <b>NEXT</b> . This number will automatically generate when the batch is saved.
<b>Company</b>	Select your company. If you have access to enter transactions for multiple companies, select the appropriate company.
<b>Pay Group</b>	Select the appropriate employee(s) pay group(s). Employees entered in the SPOT batch must be in the Pay Group entered for the Pay Period selected. When you validate the batch, an error message displays indicating the employee is not in the Pay Group.
<b>Pay Period End Date</b>	Select the appropriate pay period end date for the transactions being entered (the pop-up window will only show pay periods that have not been confirmed).
<b>Transaction Type</b>	Select the appropriate type of transaction. <ul style="list-style-type: none"> <li>• <b>Earnings</b> – earnings in addition to time and labor or additional pay (typically one time or amounts that vary from pay period to pay period).</li> <li>• <b>Deductions</b> – deduction overrides, extra deductions, or deduction refunds.</li> </ul>

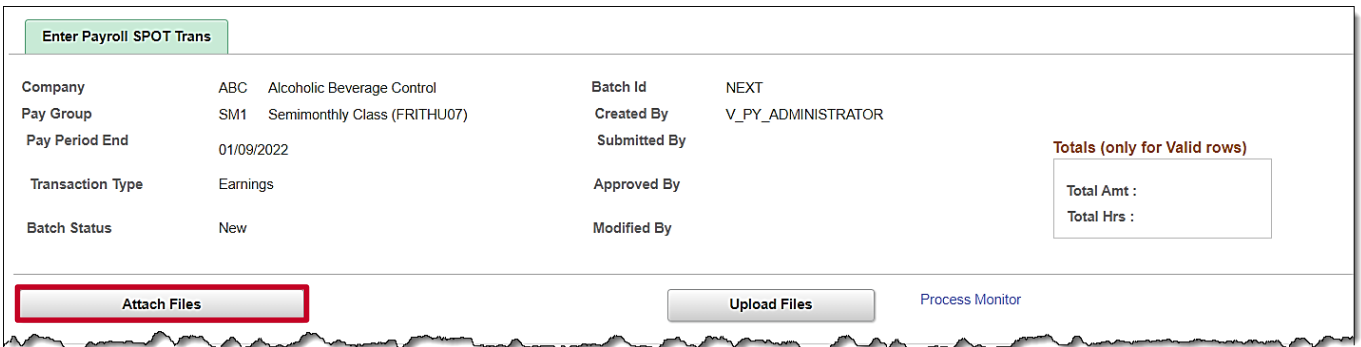
- Enter/select the appropriate values in the **Company**, **Pay Group**, **Pay Period End Date**, and **Transaction Type** fields.

**Note:** This Job Aid shows an **Earnings** transaction, but there is no difference between an **Earnings** and **Deductions** transaction through the mass upload technique.

- Click the **Add** button.

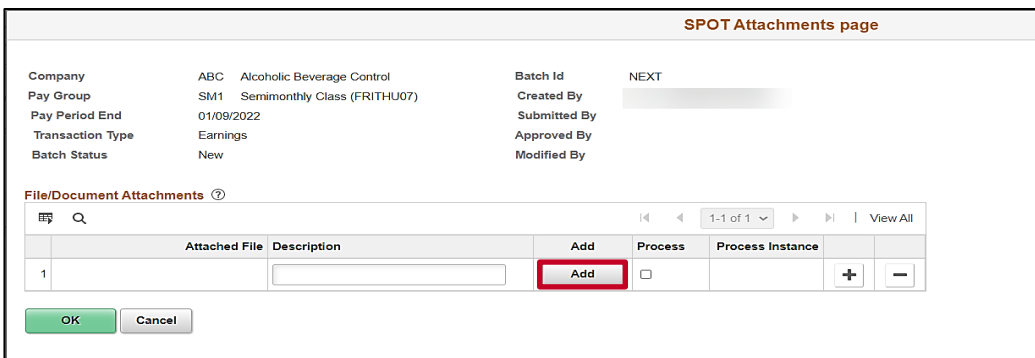
**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Enter SPOT Transactions** page refreshes with the **Enter Payroll SPOT Trans** tab displayed.



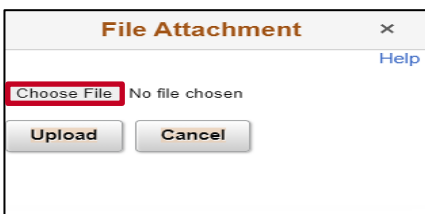
**Note:** The **Header** section populates with the information previously entered on the **Add a New Value** tab.

17. Click the **Attach Files** button.
18. The **SPOT Attachments** page pop-up window displays.



19. Click the **Add** button.

The **File Attachment** page displays in a pop-up window.

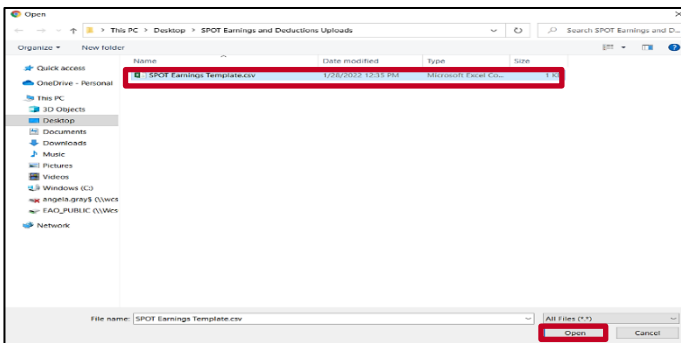


20. Click the **Choose File** button.

**Note:** Depending on the browser used, a **Browse** button may appear in place of the **Choose File** button.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

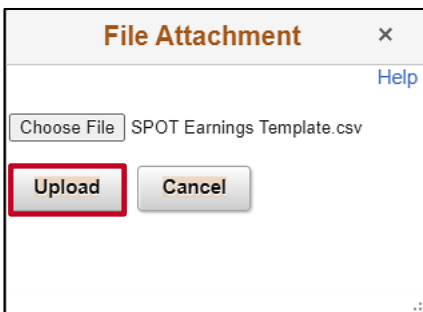
The **Open Files** pop-up window displays.



21. Navigate to and select the applicable file.

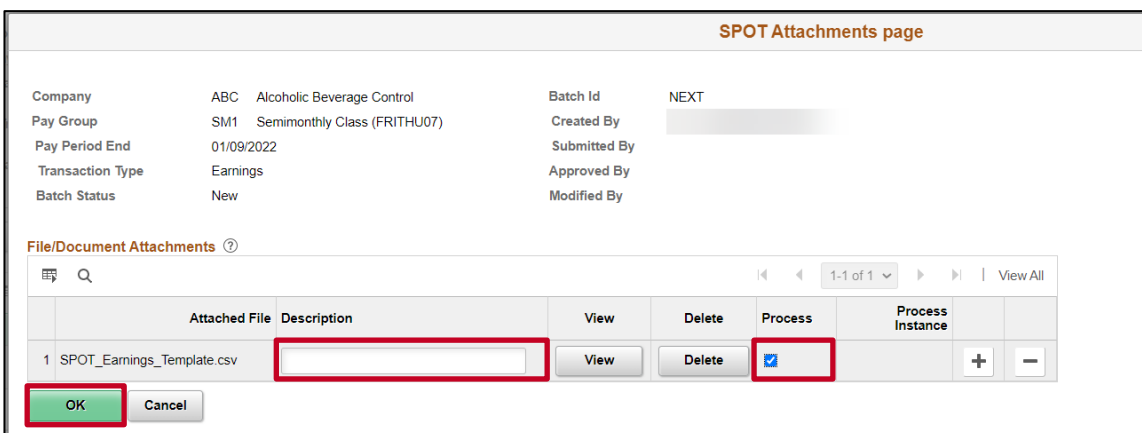
22. Click the **Open** button.

The **File Attachment** page returns.



23. Click the **Upload** button.

The **SPOT Attachments** page returns.



**Note:** The file is now connected to the batch, but individual transactions are not uploaded.

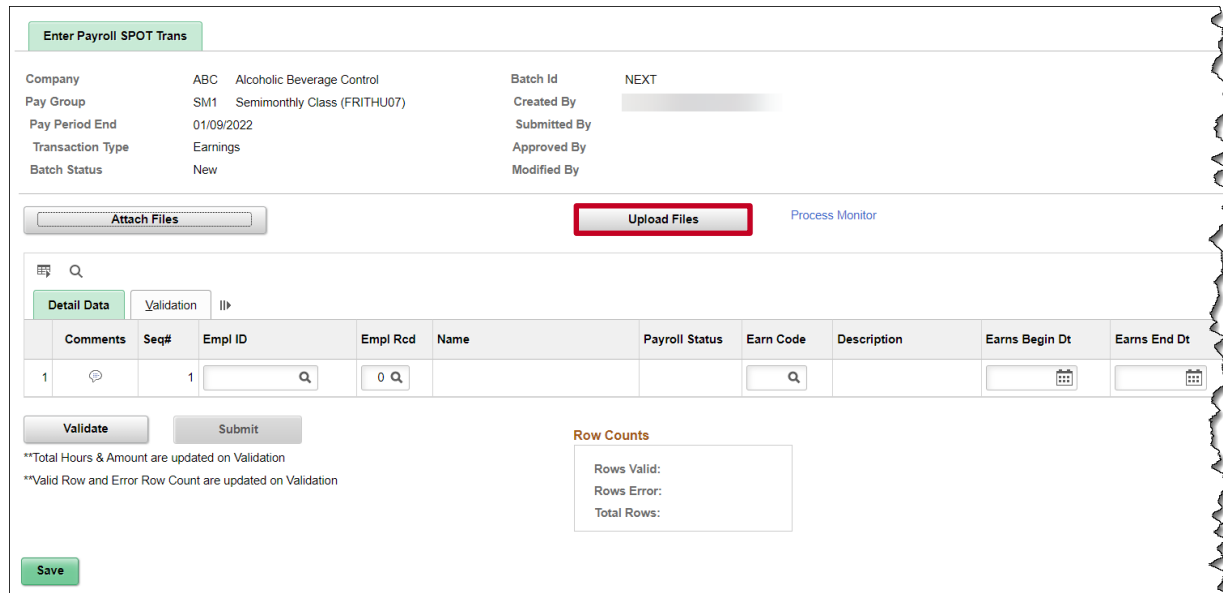
24. Enter a Description in the **Description** field if applicable.

25. Select the **Process** checkbox.

26. Click the **OK** button.

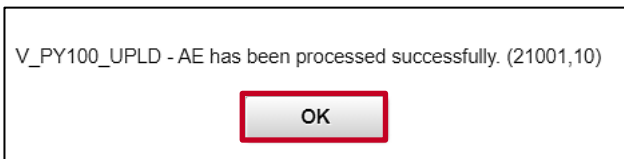
**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Enter Payroll SPOT Trans** tab returns.



27. Click the **Upload Files** button to upload the individual transactions.

The **Successful Upload** page displays in a pop-up window.



28. Click the **OK** button.

29. If the file does not successfully load, verify the following:

- All mandatory fields were properly filled out in the template
- The fields were entered using the correct format
- The file was saved in the .csv format



## PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT Trans** tab returns.

**Enter Payroll SPOT Trans**

Company: ABC Alcoholic Beverage Control  
Pay Group: SM1 Semimonthly Class (FRITHU07)  
Pay Period End: 01/09/2022  
Transaction Type: Earnings  
Batch Status: Created  
Batch ID: 105  
Created By: [Redacted]  
Submitted By: [Redacted]  
Approved By: [Redacted]  
Modified By: [Redacted]

Totals (only for Valid rows)  
Total Amt :  
Total Hrs :

Attach Files Upload Files Process Monitor

**Detail Data** Validation

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method
1	1	[Redacted]	0	[Redacted]	Active	TMP	Temporary Pay	12/10/2021	12/24/2021	1	Annualized
2	2	[Redacted]	0	[Redacted]	Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021	01/09/2022	1	Supplemental
3	3	[Redacted]	0	[Redacted]	Active	TMP	Temporary Pay	12/10/2021	12/24/2021	1	Annualized
4	4	[Redacted]	0	[Redacted]	Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021	01/09/2022	1	Supplemental
5	5	[Redacted]	0	[Redacted]	Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021	01/09/2022	1	Supplemental

Validate Submit

\*\*Total Hours & Amount are updated on Validation  
\*\*Valid Row and Error Row Count are updated on Validation

Row Counts  
Rows Valid:  
Rows Error:  
Total Rows:

Save

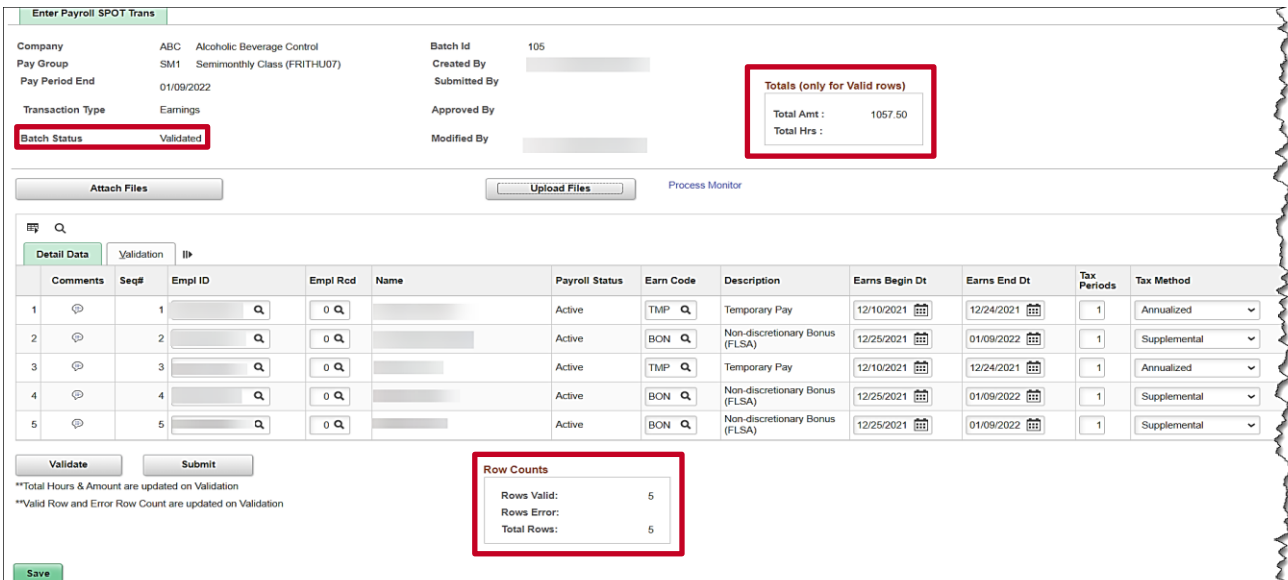
30. Verify a **Batch ID** is assigned ("105" in this example).
31. Verify the **Batch Status** field updates to "Created".
32. Verify the fields within the **Detail Data** tab were entered correctly; update as required.
33. Click the **Validate** button.

**Note:** Edits that occur when keying the batch online are applied when the **Validate** button is clicked for the uploaded template.



**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Enter Payroll SPOT Trans** tab refreshes.



**Enter Payroll SPOT Trans**

Company: ABC Alcoholic Beverage Control      Batch Id: 105  
 Pay Group: SM1 Semimonthly Class (FRTHU07)      Created By:   
 Pay Period End: 01/09/2022      Submitted By:   
 Transaction Type: Earnings      Approved By:   
 Batch Status: **Validated**      Modified By:

**Totals (only for Valid rows)**  
 Total Amt : 1057.50  
 Total Hrs :

Attach Files      Upload Files      Process Monitor

**Detail Data**      Validation      II▶

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method
1	1		0		Active	TMP	Temporary Pay	12/10/2021	12/24/2021	1	Annualized
2	2		0		Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021	01/09/2022	1	Supplemental
3	3		0		Active	TMP	Temporary Pay	12/10/2021	12/24/2021	1	Annualized
4	4		0		Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021	01/09/2022	1	Supplemental
5	5		0		Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021	01/09/2022	1	Supplemental

Validate      Submit

**Row Counts**  
 Rows Valid: 5  
 Rows Error:   
 Total Rows: 5

\*\*Total Hours & Amount are updated on Validation  
 \*\*Valid Row and Error Row Count are updated on Validation

Save

34. The **Batch Status** updates to **Validated**.

35. The **Totals (only for Valid rows)** section provides a summary of:

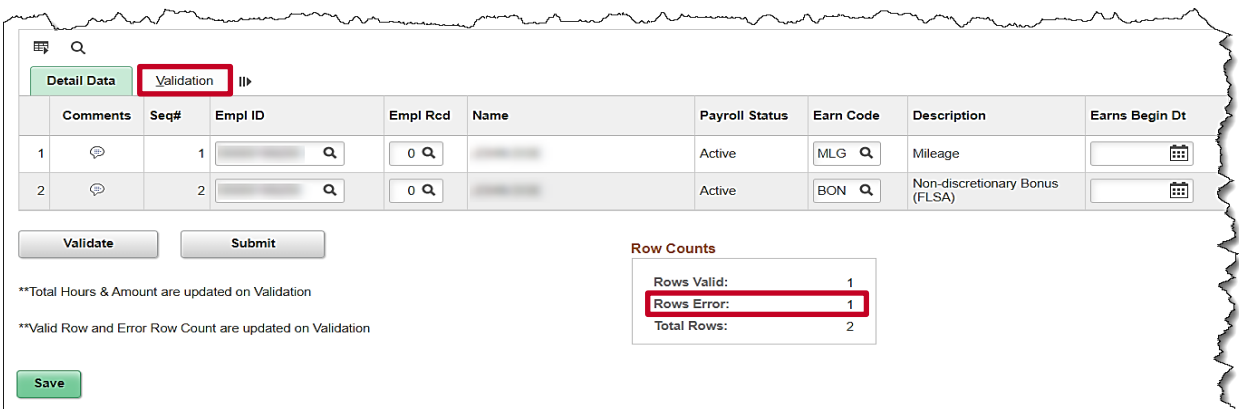
- Total Amt** – sum of the values entered in the **Amount** field for the batch
- Total Hrs** – sum of the values entered in the **Oth Hrs** field for the batch

36. The **Row Counts** section provides a summary of:

- Rows Valid** – the number of valid rows in the batch
- Rows Error** – the number of rows in the batch containing errors
- Total Rows** – total number of rows in the batch (sum of **Rows Valid** and **Rows Error** fields)

37. If the **Rows Error** field is blank, indicating all rows are valid, skip to Step 49.

The screenshot below provides an example of a batch that contains an error.



**Detail Data**      **Validation**      II▶

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1	1		0		Active	MLG	Mileage	
2	2		0		Active	BON	Non-discretionary Bonus (FLSA)	

Validate      Submit

**Row Counts**  
 Rows Valid: 1  
 Rows Error: 1  
 Total Rows: 2

\*\*Total Hours & Amount are updated on Validation  
 \*\*Valid Row and Error Row Count are updated on Validation

Save

38. If the **Rows Error** field populates with a number, indicating at least one row is not valid, click the **Validation** tab.

The **Validation** tab displays.

Enter Payroll SPOT Trans

Company	ABC Alcoholic Beverage Control	Batch Id	106
Pay Group	SM1 Semimonthly Class (FRITHU07)	Created By	
Pay Period End	01/09/2022	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Validated	Modified By	

**Totals (only for Valid rows)**  

Total Amt : 200.00  
 Total Hrs :

Attach Files

Upload Files

Process Monitor

Detail Data

Validation

1-2 of 2

View All

	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1		1		0		OK			+	-
2		2		0		Error			+	-

Validate

Submit

**Row Counts**  

Rows Valid: 1  
**Rows Error: 1**  
 Total Rows: 2

Save

Add

Update/Display

\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

- The **Validation** tab displays the status of every line within a batch and an error message for lines that are not valid.
  - The **Status** field displays one of two statuses:
    - OK** – no errors
    - Error** – issue with line
  - If there is an error during validation, the **Row Counts** section displays the number of lines with an error in the **Rows Error** field, the **Status** field populates with “**Error**” for all lines containing an error, and a bubble populates in the **Error Msg** field for all lines containing an error.
39. Click the **Bubble** icon in the **Error Msg** field to view the error message.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **SPOT Review Notes Page** pop-up window displays.

**SPOT Review Notes page** ✕

[Help](#)

Empl ID            00055228800

Empl Record     0

Seq#             2

Notes            

Amount cannot be zero for Ern\_Cd- BON;

OK
Cancel

40. Read through the **Notes** field and click the **OK** button.

The **Validation** tab returns.

Enter Payroll SPOT Trans

Company            ABC    Alcoholic Beverage Control

Pay Group          SM1    Semimonthly Class (FRITHU07)

Pay Period End     01/09/2022

Transaction Type   Earnings

Batch Status       Validated

Batch Id            106

Created By         

Submitted By      

Approved By      

Modified By

**Totals (only for Valid rows)**

Total Amt :        200.00

Total Hrs :

Attach Files
Upload Files
[Process Monitor](#)

☰ Q

⏪ ⏩ 1-2 of 2 ⏪ ⏩ View All

Detail Data

Validation

||>

Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1	1	<span style="background-color: #ccc; padding: 0 20px;"></span> <span>Q</span>	0 <span>Q</span>	<span style="background-color: #ccc; padding: 0 20px;"></span>	OK			<span style="border: 1px solid gray; padding: 0 5px;">+</span>	<span style="border: 1px solid gray; padding: 0 5px;">-</span>
2	2	<span style="background-color: #ccc; padding: 0 20px;"></span> <span>Q</span>	0 <span>Q</span>	<span style="background-color: #ccc; padding: 0 20px;"></span>	Error		<span style="background-color: #f8bbd0; padding: 0 5px;">✖</span>	<span style="border: 1px solid gray; padding: 0 5px;">+</span>	<span style="border: 1px solid gray; padding: 0 5px;">-</span>

Validate
Submit

**Row Counts**

Rows Valid:        1

Rows Error:        1

Total Rows:       2

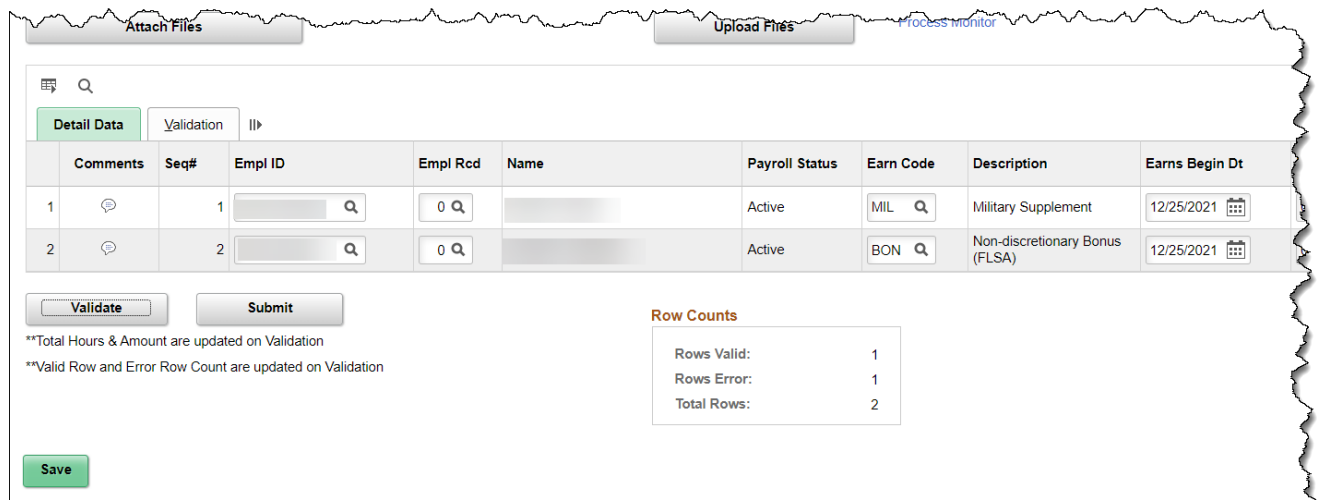
\*\*Total Hours & Amount are updated on Validation

\*\*Valid Row and Error Row Count are updated on Validation

Save
Add
Update/Display

41. Click the **Detail Data** tab.

The **Detail Data** tab returns.



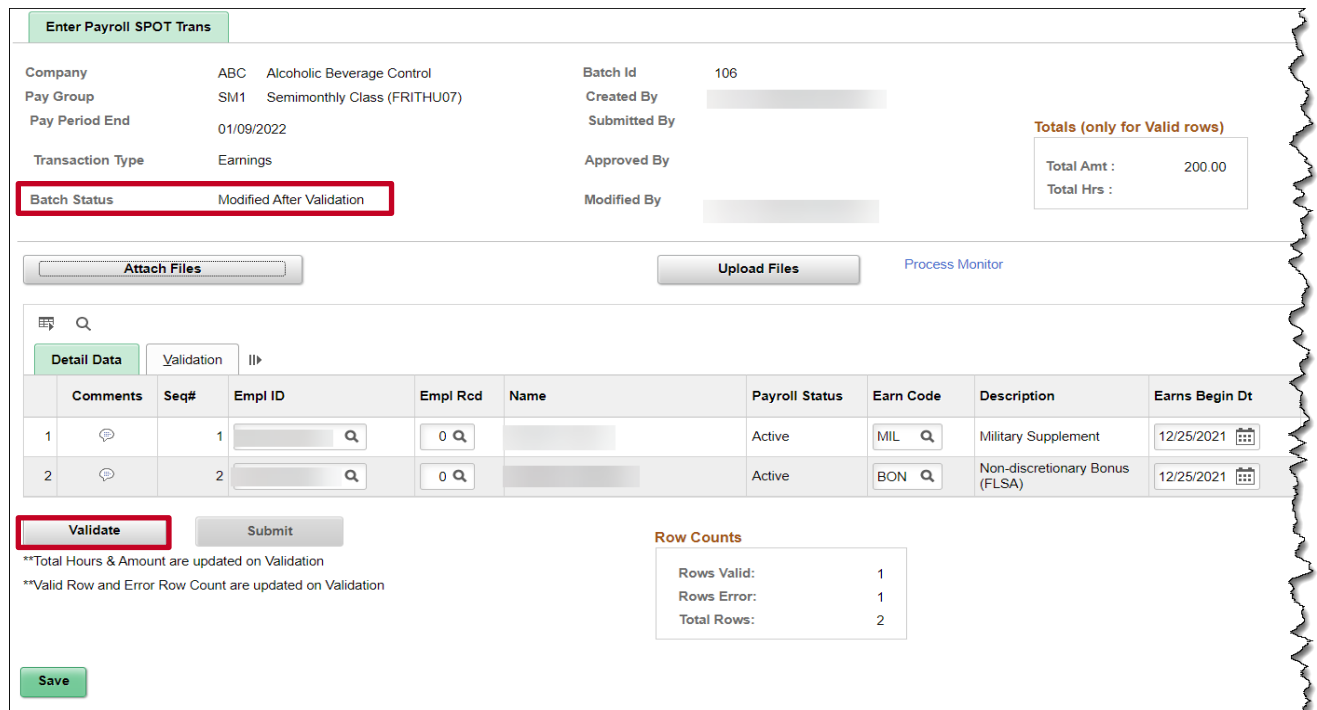
Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
	1		0		Active	MIL	Military Supplement	12/25/2021
	2		0		Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021

**Row Counts**  
 Rows Valid: 1  
 Rows Error: 1  
 Total Rows: 2

42. Update the applicable fields to correct the identified errors.

43. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.



**Enter Payroll SPOT Trans**  
 Company: ABC Alcoholic Beverage Control    Batch Id: 106  
 Pay Group: SM1 Semimonthly Class (FRITHU07)    Created By:   
 Pay Period End: 01/09/2022    Submitted By:   
 Transaction Type: Earnings    Approved By:   
 Batch Status: **Modified After Validation**    Modified By:   

**Totals (only for Valid rows)**  
 Total Amt : 200.00  
 Total Hrs :

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
	1		0		Active	MIL	Military Supplement	12/25/2021
	2		0		Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021

**Row Counts**  
 Rows Valid: 1  
 Rows Error: 1  
 Total Rows: 2

**Note:** All line items in a batch must pass validation before the batch can be submitted for approval. The **Submit** button is not enabled until all lines are validated.

44. Verify the **Batch Status** field updates to “**Modified After Validation**”.

45. Click the **Validate** button.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

CompanyABC Alcoholic Beverage ControlBatch Id106  
Pay GroupSM1 Semimonthly Class (FRITHU07)Created By  
Pay Period End01/09/2022Submitted By  
Transaction TypeEarningsApproved By  
Batch StatusValidatedModified By

**Totals (only for Valid rows)**  
Total Amt : 380.00  
Total Hrs :

Attach FilesUpload FilesProcess Monitor

Detail DataValidation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MIL	Military Supplement	12/25/2021
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	12/25/2021

ValidateSubmit

**Row Counts**  
Rows Valid: 2  
Rows Error:  
Total Rows: 2

Save

\*\*Total Hours & Amount are updated on Validation  
\*\*Valid Row and Error Row Count are updated on Validation

46. Verify the **Batch Status** field updates to “**Validated**”.
47. Verify the **Rows Error** field is blank, indicating all errors have been fixed.
48. Click the **Submit** button to submit the batch for review.

A **Confirmation Message** displays in a pop-up window.

Are you sure you want to submit the Batch? (25200,36)  
Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?  

OKCancel

49. Click the **OK** button to submit the batch for review.

**Note:** A batch cannot be edited after it is submitted.

## PY381 Using the Single-Use Payroll Online Tool (SPOT)

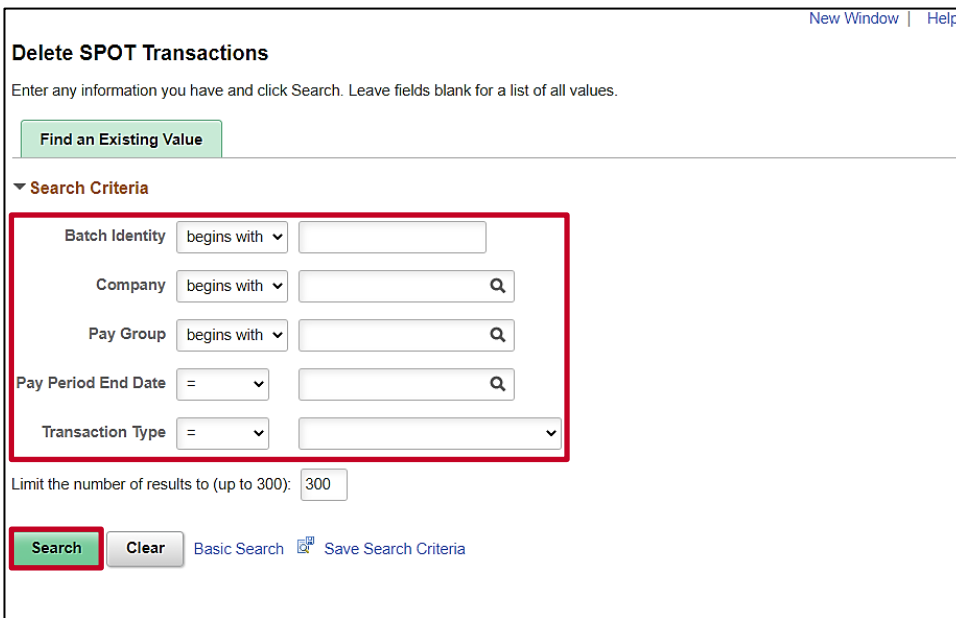
### Delete SPOT Batches

Payroll Administrators can delete batches if the batch has not been closed. All transactions within a batch are deleted and will not process when a batch is deleted. This process cannot be undone, so use only as appropriate.

Utilize the **Delete a Row** button (-) to only delete specific transactions within a batch.

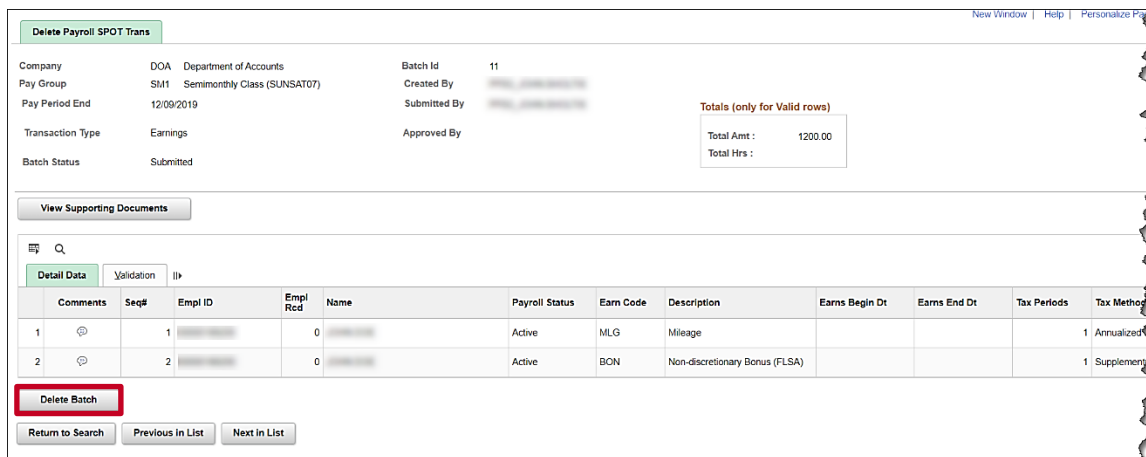
1. Navigate to the **Delete SPOT Transactions** page using the following path:

**Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Delete Spot Transactions**



2. Enter the search criteria in the corresponding fields for the applicable batch.
3. Click the **Search** button.

The **Delete SPOT Transactions** page refreshes with the applicable batch displayed.



**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

4. Click the **Delete Batch** button to delete the batch.

A **Confirmation Message** displays.

Are you sure you want to delete the Batch? (25200,38)

Once Batch is deleted it can not be opened or edited again. Are you sure you want to Delete the batch?

5. Click the **OK** button to delete the batch. Once a batch is deleted, it cannot be opened or edited.

The **Delete SPOT Transactions** search page returns.

### Delete SPOT Transactions

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**▼ Search Criteria**

Batch Identity begins with 1

Company begins with DOA Q

Pay Group begins with  Q

Pay Period End Date =  Q

Transaction Type =  ▼

Limit the number of results to (up to 300): 300

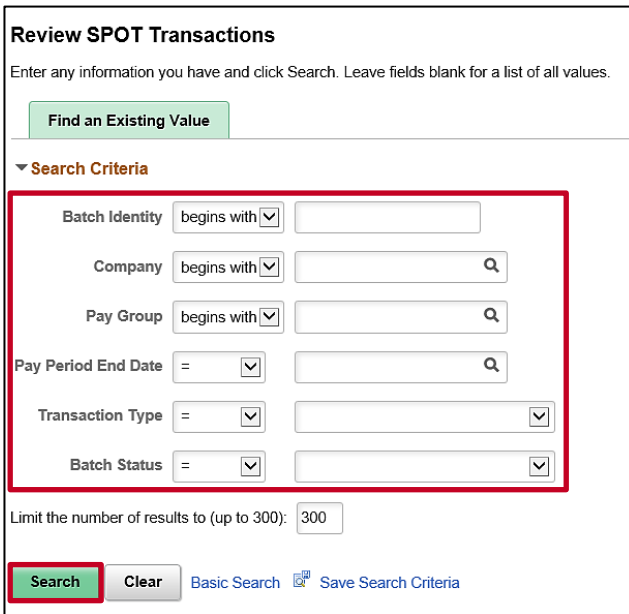
[Basic Search](#)
[Save Search Criteria](#)

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**
**Approve SPOT Transactions**

Each Agency designates at least one person as the SPOT Approver to review and approve SPOT Transactions. SPOT Approvers cannot approve a batch they personally entered. SPOT Approvers should work closely with the Payroll Administrators. A SPOT Transaction must be reentered if it is denied.

1. Navigate to the **Review SPOT Transactions** page using the following path:

**Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Review SPOT Transactions**



2. Enter the applicable/known search criteria to find the appropriate batch. Search options include the following:

Fields	Descriptions
<b>Batch Identity</b>	Number assigned to the Batch.
<b>Company</b>	The three-character company code.
<b>Pay Group</b>	Pay group options for the Company
<b>Pay Period End Date</b>	Select the Pay Period end date for the batch you want to approve.
<b>Transaction Types</b>	Select the appropriate option: <ul style="list-style-type: none"> <li>• Earnings</li> <li>• Deductions</li> </ul>
<b>Batch Status</b>	Options include: <ul style="list-style-type: none"> <li>• Closed</li> <li>• Created</li> <li>• Deleted</li> <li>• In Review</li> </ul>



**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

	<ul style="list-style-type: none"> <li>• Modified After Validation</li> <li>• New</li> <li>• Submitted</li> <li>• Validated</li> </ul>
--	--

3. Click the **Search** button.


The **Review SPOT Transactions** page refreshes and displays matching the Search Results.

**Review SPOT Transactions**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

**▼ Search Criteria**

Batch Identity begins with   
Company begins with  DOA   
Pay Group begins with  SM1   
Pay Period End Date =  12/09/2019   
Transaction Type =    
Batch Status =  Submitted   
Limit the number of results to (up to 300):  300

[Basic Search](#)  [Save Search Criteria](#)

**Search Results**

View All 1-2 of 2

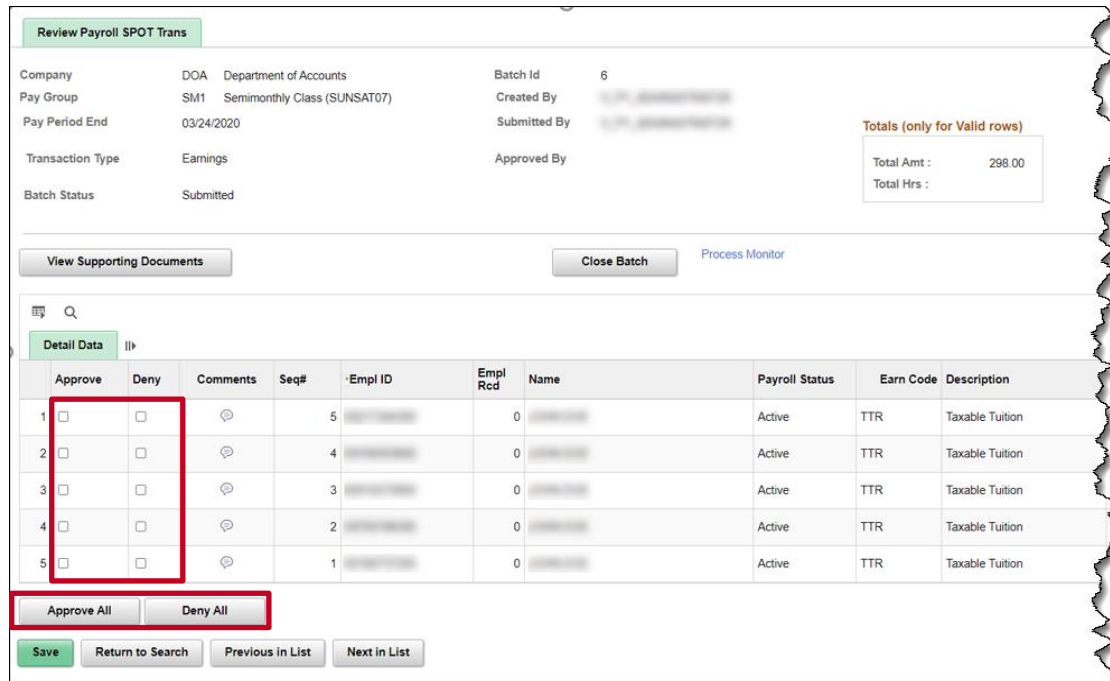
Batch Identity	Company	Pay Group	Pay Period End Date	Transaction Type	Batch Status
4	DOA	SM1	12/09/2019	Earnings	Submitted
5	DOA	SM1	12/09/2019	Deduction	Submitted

4. Click anywhere on the appropriate batch's line to navigate to the corresponding batch's **Review Payroll SPOT Trans** tab.

**Note:** This step is automatically skipped if only one batch matches the Search Criteria entered.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Review Payroll SPOT Trans** tab displays.



**Review Payroll SPOT Trans**

Company: DOA Department of Accounts Batch Id: 6  
 Pay Group: SM1 Semimonthly Class (SUNSAT07) Created By: [redacted]  
 Pay Period End: 03/24/2020 Submitted By: [redacted]  
 Transaction Type: Earnings Approved By: [redacted]  
 Batch Status: Submitted

**Totals (only for Valid rows)**  
 Total Amt: 298.00  
 Total Hrs: [redacted]

View Supporting Documents Close Batch Process Monitor

**Detail Data**

	Approve	Deny	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
1	<input type="checkbox"/>	<input type="checkbox"/>		5	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition
2	<input type="checkbox"/>	<input type="checkbox"/>		4	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition
3	<input type="checkbox"/>	<input type="checkbox"/>		3	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition
4	<input type="checkbox"/>	<input type="checkbox"/>		2	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition
5	<input type="checkbox"/>	<input type="checkbox"/>		1	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition


Approve All Deny All

Save Return to Search Previous in List Next in List

5. Review the entries on the batch.
6. Approve or deny the batch using one of the following options:
  - a. To approve or deny individual transactions, select the appropriate **Approve** or **Deny** checkbox option for each individual transaction.
  - b. To approve or deny the entire batch, select the appropriate **Approve All** or **Deny All** button.

**Note:** SPOT Approvers cannot edit SPOT transactions.

The **Detail Data** tab updates.



**Detail Data**

	Approve	Deny	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		5	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		4	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		3	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		2	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1	[redacted]	0	[redacted]	Active	TTR	Taxable Tuition

Approve All Deny All

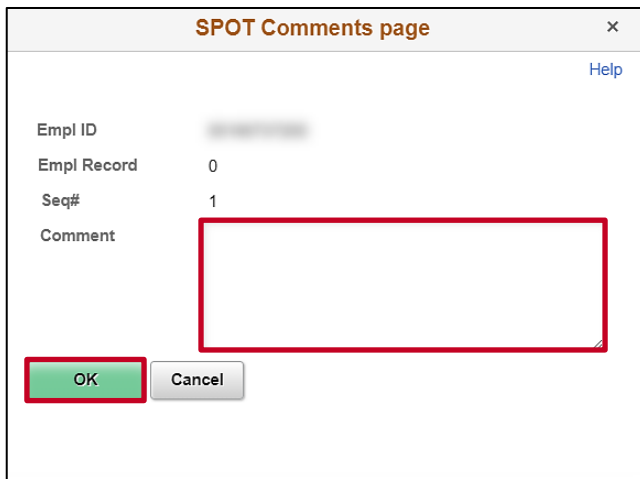
Save Return to Search Previous in List Next in List

**Note:** In this example, four transactions were approved, and one transaction was denied.

7. Click the corresponding **Comments** icon for any denied transactions.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **SPOT Comments** page pop-up window displays.



The SPOT Comments page pop-up window displays the following fields:

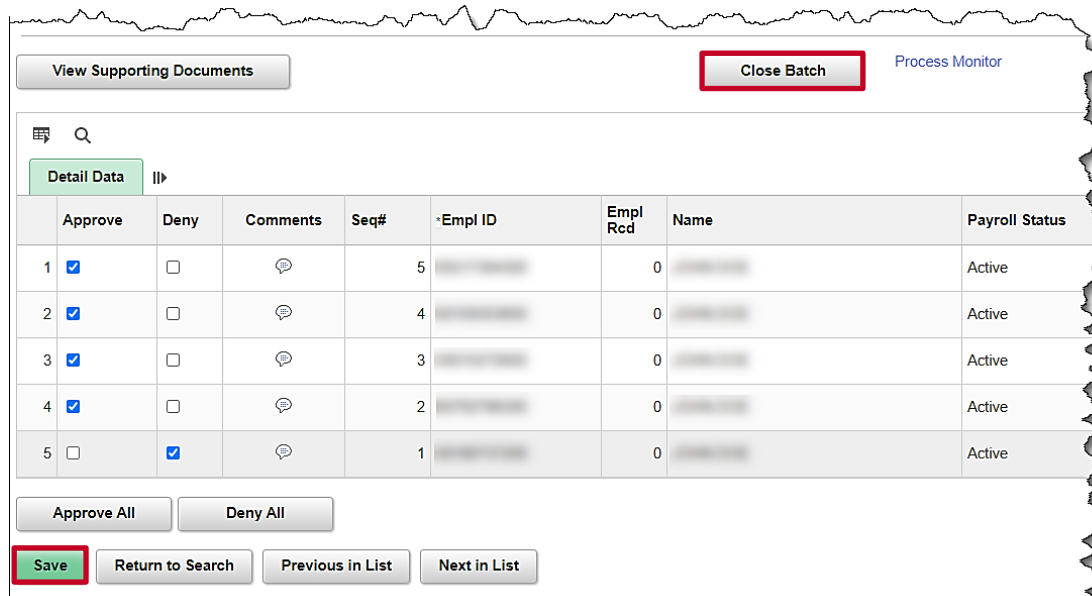
- Empl ID: [Redacted]
- Empl Record: 0
- Seq#: 1
- Comment: [Redacted]

Buttons: OK, Cancel

**Note:** Cardinal does not require a comment, but comments are strongly recommended for audit purposes.

8. Enter a comment explaining why the transaction was denied in the **Comment** field.
9. Click the **OK** button.

The **Review Payroll SPOT Trans** tab returns.



The Review Payroll SPOT Trans tab displays the following information:

Buttons: View Supporting Documents, Close Batch, Process Monitor

Detail Data

	Approve	Deny	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[Redacted]	5	[Redacted]	0	[Redacted]	Active
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[Redacted]	4	[Redacted]	0	[Redacted]	Active
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[Redacted]	3	[Redacted]	0	[Redacted]	Active
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[Redacted]	2	[Redacted]	0	[Redacted]	Active
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[Redacted]	1	[Redacted]	0	[Redacted]	Active

Buttons: Approve All, Deny All, Save, Return to Search, Previous in List, Next in List

10. Click the **Save** button.
11. Click the **Close Batch** button to submit the batch for processing.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **Confirmation Message** displays in a pop-up window.

Are you sure you want to close the Batch? (25200,37)

Once Batch is closed it can not be reviewed or edited again. All Approved transactions will be posted to NA Payroll. Are you sure you want to Close the batch?

OK
Cancel

12. Click the **OK** button.

The **Review Payroll SPOT Trans** tab refreshes.

[New Window](#) | [Help](#) | [Personalize Page](#)

**Review Payroll SPOT Trans**

Company	DOA Department of Accounts	Batch Id	6	
Pay Group	SM1 Semimonthly Class (SUNSAT07)	Created By		
Pay Period End	03/24/2020	Submitted By		
Transaction Type	Earnings	Approved By		
<b>Batch Status</b>	<b>Closed</b>			

**Totals (only for Valid rows)**  
 Total Amt : 298.00  
 Total Hrs :

View Supporting Documents
Close Batch
Process Monitor
Instance 1321115

13. Verify the **Batch Status** field updates to “**Closed**”.

14. Verify the **Approved By** field populates with your Cardinal ID.

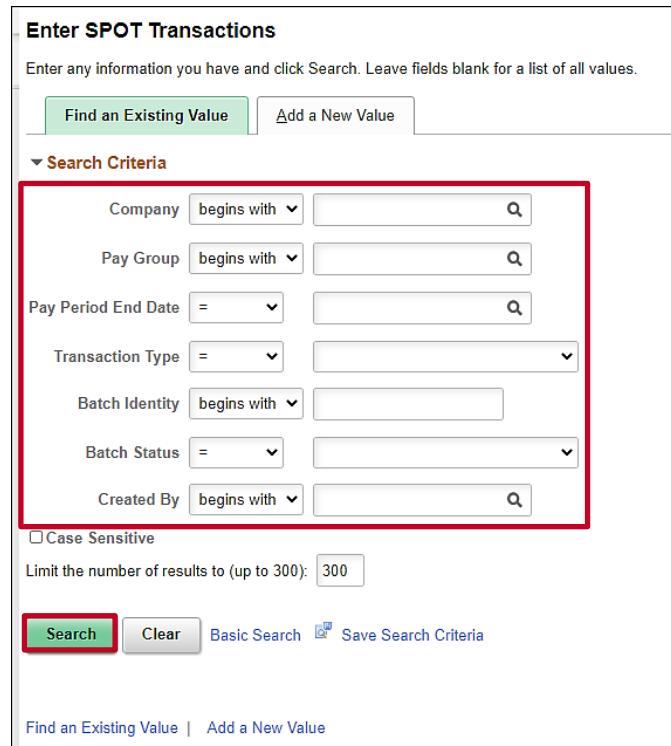
**Note:** The transactions will be loaded to payroll during the next SPOT Load to Payroll process.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)****Review Batches after Approval**

After a SPOT Approver has reviewed and approved or denied a batch, the Payroll Administrator can review the status. If a SPOT transaction is denied, it must be re-entered into a new batch for processing.

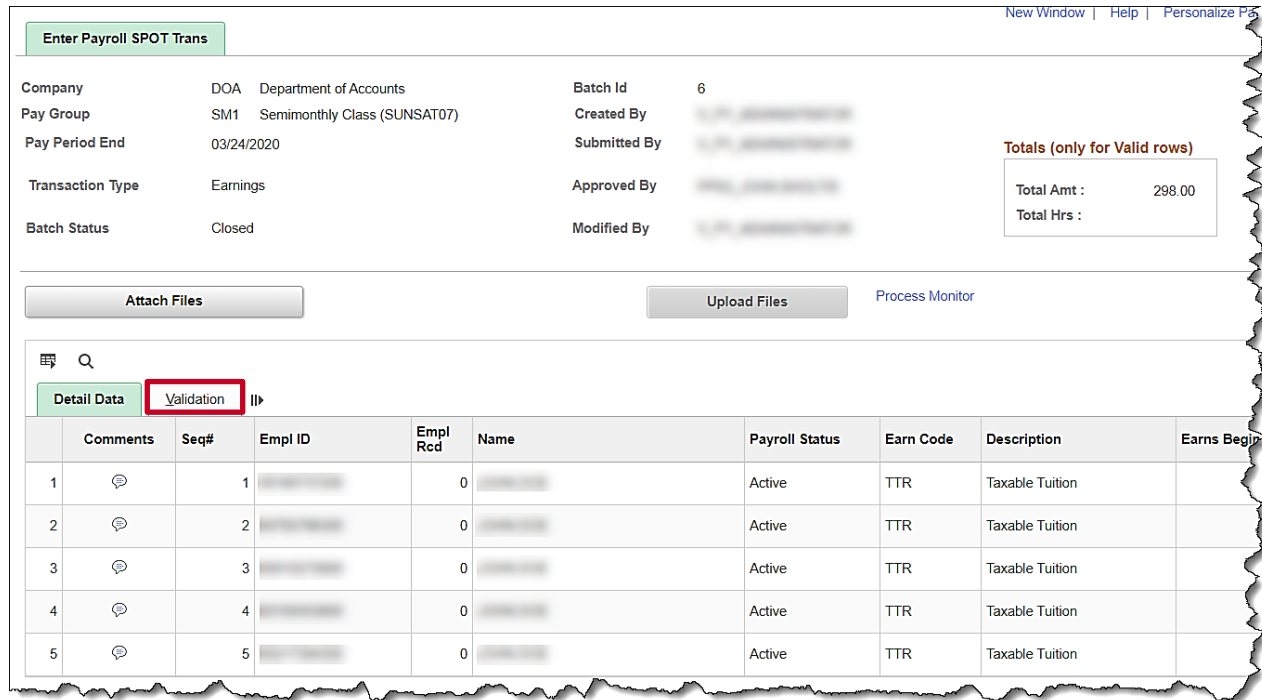
1. To review a batch for approval, navigate to the **Enter SPOT Transactions** page using the following path:

**Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions**



2. Enter the appropriate data in the corresponding **Search Criteria** fields.
3. Click the **Search** button.

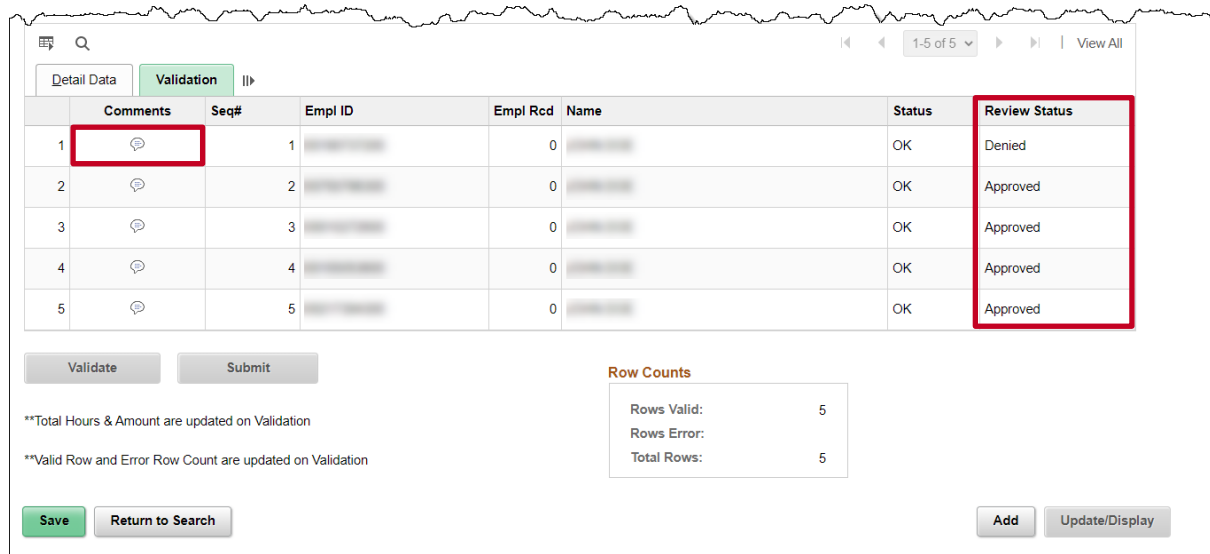
The **Enter Payroll SPOT Trans** tab displays for the applicable batch.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin
	1		0		Active	TTR	Taxable Tuition	
	2		0		Active	TTR	Taxable Tuition	
	3		0		Active	TTR	Taxable Tuition	
	4		0		Active	TTR	Taxable Tuition	
	5		0		Active	TTR	Taxable Tuition	

4. Click the **Validation** tab to review the approval status of the transactions on the batch.

The **Validation** tab displays.



Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status
	1		0		OK	Denied
	2		0		OK	Approved
	3		0		OK	Approved
	4		0		OK	Approved
	5		0		OK	Approved

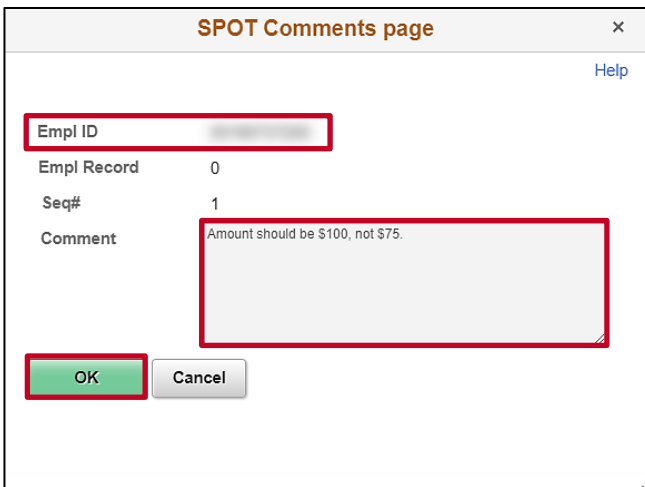
**Row Counts**  
 Rows Valid: 5  
 Rows Error: 0  
 Total Rows: 5

5. Review the **Review Status** field, which indicates whether each transaction was approved or denied.

6. Click the **Comments** icon for any transaction(s) that were denied.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **SPOT Comments** page displays in a pop-up window.

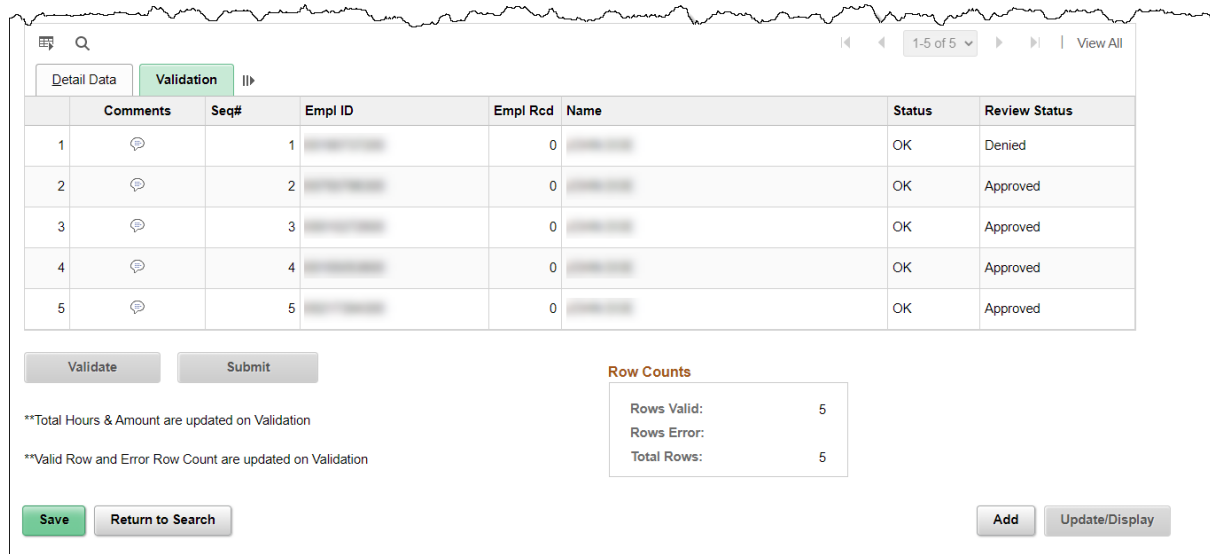


7. Make note of the Employee ID and any comments provided.

**Note:** If there is no comment recorded, contact the SPOT Approver to discuss the reason the transaction was denied.

8. Click the **OK** button.

The **Validation** tab returns.



	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status
1				0		OK	Denied
2				0		OK	Approved
3				0		OK	Approved
4				0		OK	Approved
5				0		OK	Approved

**Row Counts**  
 Rows Valid: 5  
 Rows Error: 0  
 Total Rows: 5

**Note:** For additional information on entering SPOT transactions, refer to the **Enter an Earnings Transaction in SPOT** or **Enter a Deduction Transaction in SPOT** sections of this Job Aid.

## PY381 Using the Single-Use Payroll Online Tool (SPOT)

### Monitor SPOT Transactions

There are two key SPOT tools to help monitor transactions:

- Single-Use Payroll Online Transaction (SPOT) Online query
- SPOT Transactions Not Loaded to Paylines

### SPOT Online Query

This query displays all SPOT Transactions for a specific pay period. Navigate to the SPOT Online Transaction Query using the following path:

**Navigator > Reporting Tools > Query > Query Viewer**

The **Query Viewer** page displays.



**Query Viewer**

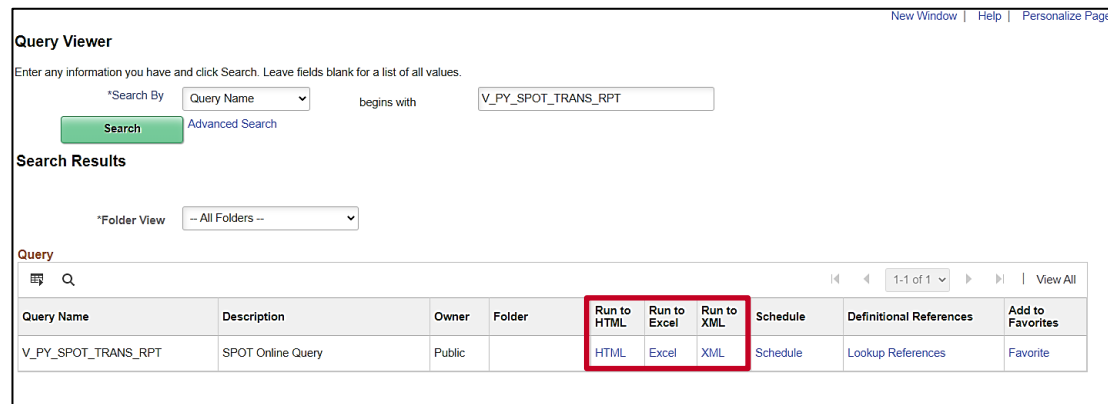
Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By Query Name begins with

Search [Advanced Search](#)

1. Enter **V\_PY\_SPOT\_TRANS\_RPT** in the **begins with** field.
2. Click the **Search** button.

The **Query Viewer** page refreshes.



**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By Query Name begins with

Search [Advanced Search](#)

\*Folder View -- All Folders --

**Search Results**

**Query**

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_PY_SPOT_TRANS_RPT	SPOT Online Query	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

3. Select the applicable **Run to** link (e.g., HTML, Excel, XML).




**Note:** The **Run to HTML** link was selected in the example below.



## PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Online Query** opens in a new Internet Browser window.




V\_PY\_SPOT\_TRANS\_RPT - SPOT Online Query

Company    
 Paygroup    
 Pay Run ID    
 View Results

Row	Agency (Company)	Paygroup	Business Unit	Agency Description	Pay Period End Date	Batch ID	Batch Status	Transaction Type	Valid Status	Review Status	Employee ID	Empl Record	Employee Name	Employee Status	Deduction or Earnings Code	Deduction or Earnings Amount	Other Hours
-----	------------------	----------	---------------	--------------------	---------------------	----------	--------------	------------------	--------------	---------------	-------------	-------------	---------------	-----------------	----------------------------	------------------------------	-------------

- Enter/select the applicable Company, Paygroup, and Pay Run ID using the corresponding look-up icons.
- Click the **View Results** button.

V\_PY\_SPOT\_TRANS\_RPT - SPOT Online Query

Company    
 Paygroup    
 Pay Run ID    
 View Results

Download results in: Excel Spreadsheet CSV Text File XML File (5 kb)

View All

	Agency (Company)	Paygroup	Business Unit	Agency Description	Pay Period End Date	Batch ID	Batch Status	Transaction Type	Valid Status	Review Status	Employee ID	Empl Record	Employee Name	Employee Status	Deduction or Earnings Code	Deduction or Earnings Amount	Other Hours
1	MFA	SM1	23800	VA Museum of Fine Arts	10/24/2017	2	Closed	Earnings	OK	Approved	T655514	0		Active	BON	200.00	0.00
2	MFA	SM1	23800	VA Museum of Fine Arts	10/24/2017	1	Closed	Earnings	OK	Approved	T655514	0		Active	BON	200.00	0.00
3	MFA	SM1	23800	VA Museum of Fine Arts	10/24/2017	2	Closed	Earnings	OK	Approved	T655515	0		Active	DBN	150.00	0.00
4	MFA	SM1	23800	VA Museum of Fine Arts	10/24/2017	1	Closed	Earnings	OK	Approved	T655515	0		Active	DBN	150.00	0.00

First 1-4 of 4 Last

**Note:** The results can be downloaded to Excel, CSV, or XML for review.

### SPOT Transactions Not Loaded to Paylines Report

Batches are loaded to the Paysheet Transaction Table after they are closed. The Delivered Paysheet Transaction Process runs according to operation calendars.

The **SPOT Transactions Not Loaded to Paylines** report reflects transactions that are both Accepted and Closed but do not appear in the employee's paycheck.

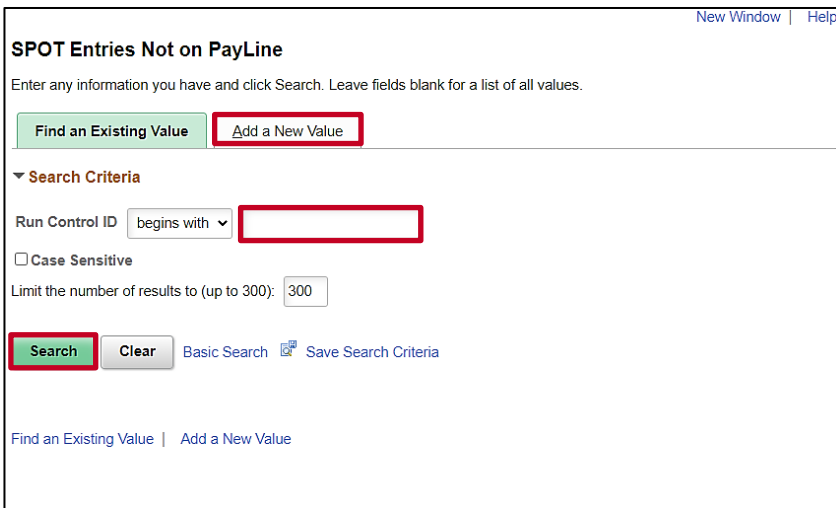
Note: For further information about Reviewing Employee Paychecks, refer to the Job Aid titled **PY381 Review the View Paycheck Page**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- Navigate to the **SPOT Transactions Not Loaded to Paylines** report using the following path:

**Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > SPOT Entries Not on PayLine**

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**

The **SPOT Entries Not on PayLine** page displays.



[New Window](#) | [Help](#)

### SPOT Entries Not on PayLine

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) **[Add a New Value](#)**

▼ **Search Criteria**

Run Control ID begins with ▼

☐ Case Sensitive

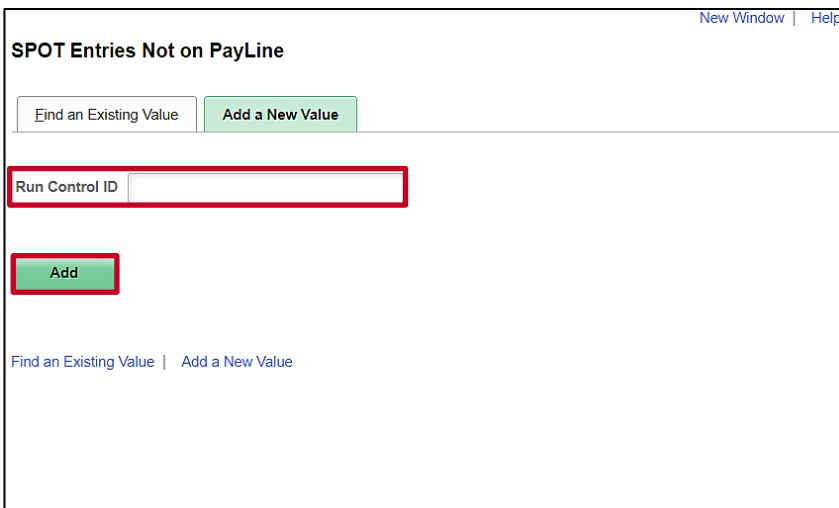
Limit the number of results to (up to 300):

**[Search](#)** [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

7. To search for an existing Run Control ID, enter the Run Control ID name in the **Run Control ID** field.
8. Click the **Search** button, then skip to Step 7.
9. To create a new Run Control ID, click the **Add a New Value** tab.

The **Add a New Value** tab displays.



[New Window](#) | [Help](#)

### SPOT Entries Not on PayLine

[Find an Existing Value](#) **[Add a New Value](#)**

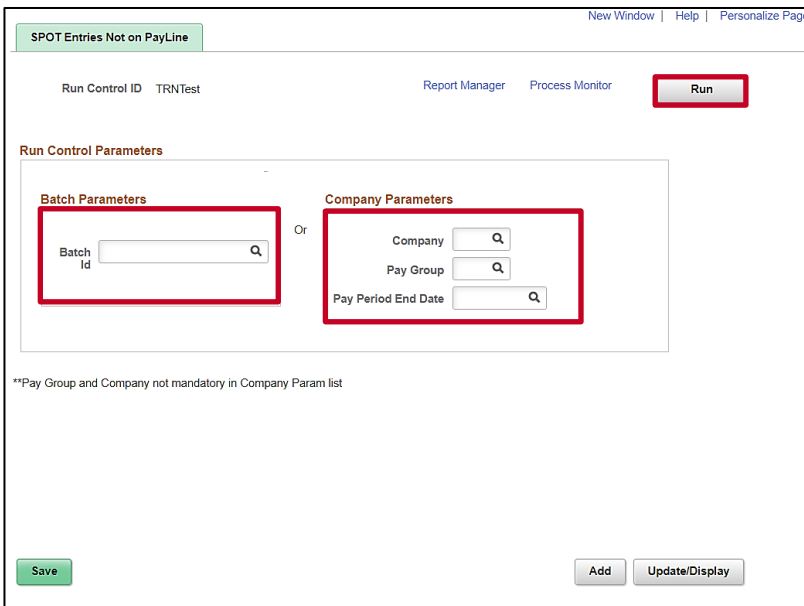
Run Control ID

**[Add](#)**

[Find an Existing Value](#) | [Add a New Value](#)

10. Enter the desired name in the **Run Control ID** field.
11. Click the **Add** button.

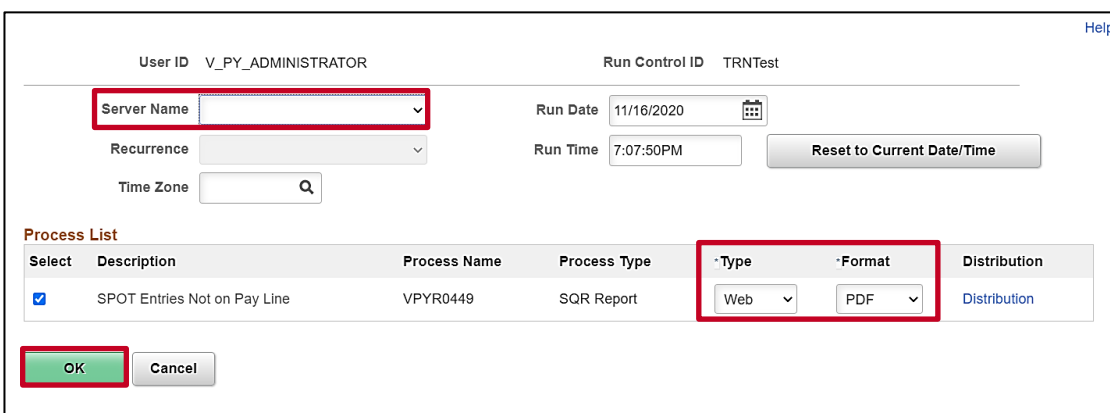
The **SPOT Entries Not on PayLine** page refreshes.



12. Enter/select the appropriate Run Control Parameters using either the **Batch Parameters** section or **Company Parameters** section.
  - a. To use Batch Parameters, enter/select the appropriate Batch ID using the **Batch ID** field look-up icon.
  - b. To use Company Parameters, enter/select the appropriate Company, Pay Group, and Pay Period End Date using the corresponding field look-up icons.

**Note:** The **Pay Group** and **Company** fields are not mandatory.

13. Click the **Run** button.



Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	SPOT Entries Not on Pay Line	VPYR0449	SQR Report	Web	PDF	Distribution

14. Select the appropriate Server Name using the **Server Name** drop-down menu.
15. Confirm the **Type** and **Format** are correct.
16. Click the **Ok** button.

The **SPOT Entries Not on PayLine** page refreshes.

SPOT Entries Not on PayLine

Run Control ID

TRNTest

Report Manager

Process Monitor

Run

Run Control Parameters

Batch Parameters

Batch Id

Or

Company Parameters

Company

Pay Group

Pay Period End Date

\*\*Pay Group and Company not mandatory in Company Param list

17. Click the **Report Manager** link.

The **Report Manager** page displays.

List Explorer Administration Archives

View Reports For

Folder

Instance  to

Refresh

Name

Created On

Last

1 Days

Reports

1-2 of 2

View All

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 <a href="#">VPYR0449</a>	SPOT ENTRIES NOT ON PAY LINE	General	11/16/20 7:11PM	751091	1308709
2 <a href="#">VPYR0449</a>	SPOT ENTRIES NOT ON PAY LINE	General	11/16/20 7:10PM	751090	1308708

Go back to SPOT Entries Not on PayLine

Save

18. Click the **Refresh** button until the appropriate report displays.

19. Click the **Report** link to review.



## PY381 Using the Single-Use Payroll Online Tool (SPOT)

The Report Information displays.

**Report**  
Report ID 751091      Process Instance 1308709      [Message Log](#)  
Name VPYR0449      Process Type SQR Report  
Run Status Error  
  
SPOT Entries Not on Pay Line  
  
**Distribution Details**  
Distribution Node hrpytrn      Expiration Date 12/16/2020  
  
**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">SQR_VPYR0449_1308709.log</a>	1,114	11/16/2020 7:11:35.645449PM EST

  
**Distribute To**

Distribution ID Type	Distribution ID
User	V_PY_ADMINISTRATOR

  
[Return](#)

20. Click the **Name** link to view the report.

Report ID: VPYR0449

Commonwealth of Virginia

SPOT TRANSACTIONS NOT LOADED TO PAYLINE

Run Date: 05/25/2018

Run Time: 12:58 00

Page No. 1 of 1

Batch Id : 103  
Pay Period End : 19-AUG-2017  
Business Unit : 23800 VA Museum of Fine Arts  
Company : MFA Pay Group : BW1  
Batch Type : D Batch\_Status : Closed

Seq#	EmplID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Amount	One-Time Code	Seperate Check#
1	T655362	0	T655362,Employee	A	10	CVABAS	CVACRE	CoVA Care	B	\$ .00	P	0
2	T655793	0	Employee,Employee T655793	A	42	RTCRDJ	RETHCJ	Judicial Retiree Health Credit	P	\$ .00	R	0

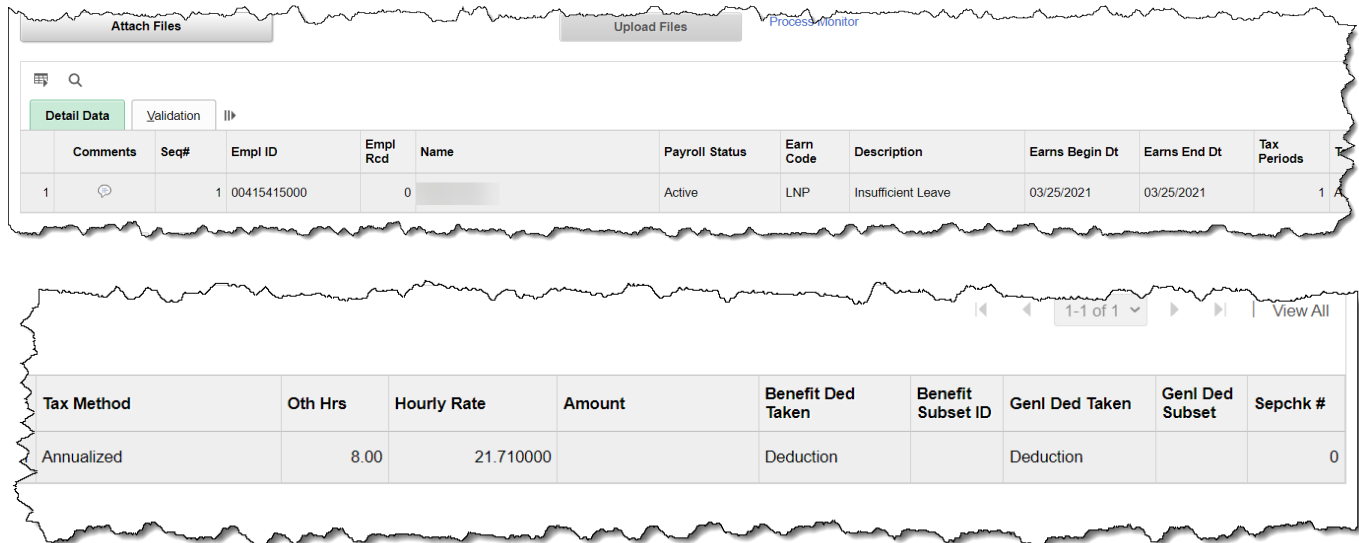
**Note:** For further information on the **SPOT Transactions Not Loaded to PayLine Report**, refer to the HCM Reports Catalog. This Catalog is located on the Cardinal website under **Learning**.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**
**SPOT Scenarios**

In this section, we will review various scenarios regarding how to enter specific transactions into SPOT. For each scenario, you will be able to see how to enter the transaction into SPOT and how it displays on the Review Paycheck page.

**Entering Pay Docking (LNP)**

In this scenario, we will enter 8 hours of pay docking for an employee in the current payroll (pay period ending 04/09/2021)



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods
	1	00415415000	0		Active	LNP	Insufficient Leave	03/25/2021	03/25/2021	1

Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #
Annualized	8.00	21.710000		Deduction		Deduction		0

1. Enter/select the following:
  - a. **Empl ID**
  - b. **Empl Rcd**: Defaults to **0**. Update if necessary
  - c. **Earn Code**: LNP
  - d. **Earns Begin Dt**: enter the begin date of the period the employee is being docked
  - e. **Earns End Dt**: enter the end date of the period the employee is being docked  
**Note**: If the pay docking is for a prior period, the employee must have regular pay in that period for the LNP to process. If the employee does not have regular pay, process the LNP in the current period
  - f. **Oth Hrs**: enter the hours to be docked (in this scenario 8)
  - g. **Hourly Rate**: Enter the hourly rate for the period
2. Validate and submit the transaction for approval.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**
**Review Paycheck Page**

In the **Other Earnings** section of the **Review Paycheck** page, you can see the SPOT transaction that processed for the employee.

Begin Date

03/25/2021

End Date

03/25/2021

Addl Line Nbr

3

Reason

Empl Record

0

Benefit Record

0

Additional Data

Salaried

Hours

0.00

Rate

24.038462

Earnings

0.00

Hourly

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

Overtime

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

State

VA

Locality

Rate Used

Hourly Rate

Shift

Not Applicable

Shift Rate

Other Earnings

1-1 of 1

View All

Other Earnings Details 1

Other Earnings Details 2

Code	Description	Rate Used	Hours	Rate	Amount	Source
LNP	Insufficient Leave	Hourly Rate	8.00	21.710000	173.68	OP

The **LNP** displays in the **Other Earnings** section for the specific period the that it was entered in SPOT.

Begin Date

03/25/2021

End Date

03/25/2021

Addl Line Nbr

4

Reason

Empl Record

0

Benefit Record

0

Additional Data

Salaried

Hours

0.00

Rate

24.038462

Earnings

0.00

Hourly

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

Overtime

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

State

VA

Locality

Rate Used

Hourly Rate

Shift

Not Applicable

Shift Rate

Other Earnings

1-1 of 1

View All

Other Earnings Details 1

Other Earnings Details 2

Code	Description	Rate Used	Hours	Rate	Amount	Source
RGS	Regular Time - Salaried	Hourly Rate	-8.00	21.710000	-173.68	OP

A second line for **Regular Time – Salaried** (RGS) is automatically created by Cardinal during the SPOT Load Process for LNP.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**
**Entering Adjustments to Regular Pay – Hire or Terminated Mid Pay Period**

If an employee is hired/terminated in the middle of the pay period a reduction of regular pay may be necessary. When an employee is hired or terminated within the pay period, the system calculates partial pay based on an annualized hourly rate and not the pay period hourly rate.

Payroll Administrators will need to calculate what the employee is due using the pay period hourly rate and enter the adjustment in SPOT.

In this scenario, an employee terminates in the middle of the pay period (11/1).

- The system will calculate the partial pay from 10/25 – 10/31 that is due to the employee at an annualized hourly rate.
- You will need to calculate the amount due using the pay period hourly rate then enter the adjustment in SPOT.
- For this scenario, the employee needs to have a pay reduction of \$41.25.



The screenshot shows the SPOT system interface. At the top, there are tabs for 'Detail Data' and 'Validation'. Below the tabs is a table with the following columns: Comments, Seq#, Empl ID, Empl Rcd, Name, Payroll Status, Earn Code, Description, Earns Begin Dt, Earns End Dt, and Tax Period. The first row shows a terminated employee with a sequence number of 1, an empl ID, an empl rcd, a name, a payroll status of 'Terminated', an earn code of 'RGS', a description of 'Regular Time - Salaried', an earn start date of 10/25/2021, an earn end date of 10/31/2021, and a tax period of 1.

Below this table is a section for 'Tax Periods' with a table that has the following columns: Tax Method, Oth Hrs, Hourly Rate, Amount, Benefit Ded Taken, Benefit Subset ID, Genl Ded Taken, Genl Ded Subset, Sepchk #, and two empty columns for '+' and '-'. The first row shows an annualized tax method, -1.00 oth hrs, a hourly rate of 41.250000, and a deduction of 41.250000.

- Enter the following:
  - Empl ID**
  - Empl Rcd**: Defaults to 0. Update if necessary
  - Earn Code**: RGS
  - Earns Begin Dt**: enter the begin date of the period the employee terminated
  - Earns End Dt**: enter the employee's last day worked
  - Oth Hrs**: enter -1
  - Hourly Rate**: Enter the amount of pay to be reduced
- Validate and submit the transaction for approval.



**PY381 Using the Single-Use Payroll Online Tool (SPOT)**
**Review Paycheck Page**

In the **Other Earnings** section of the **Review Paycheck** page, you can see the SPOT transaction that processed for the employee.

Earnings

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View All

Begin Date

10/25/2021

End Date

10/31/2021

Addl Line Nbr

3

Reason

Empl Record

0

Benefit Record

0

Additional Data

Salaried

Hours

0.00

Rate

24.697596

Earnings

0.00

Hourly

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

Overtime

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

State

VA

Locality

Rate Used

Hourly Rate

Shift

Not Applicable

Shift Rate

Other Earnings

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View All

Other Earnings Details 1

Other Earnings Details 2

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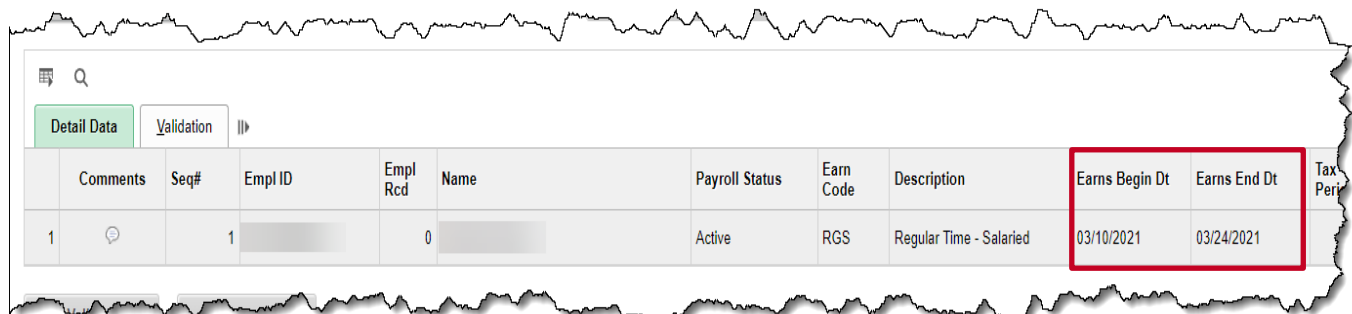
Code	Description	Rate Used	Hours	Rate	Amount	Source
RGS	Regular Time - Salaried	Hourly Rate	-1.00	41.250000	-41.25	OP

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**
**Entering Adjustments to Regular Pay – Change in Compensation from Prior Period**

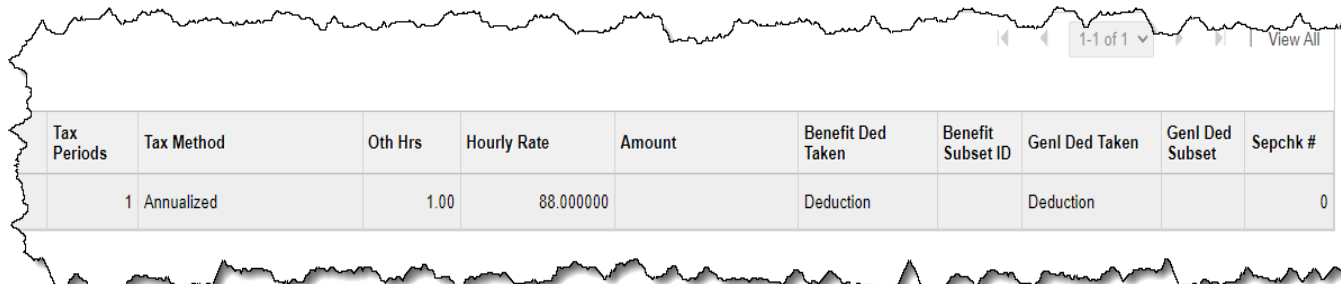
If an employee has a change in compensation, an addition to regular pay may be necessary.

For this scenario, the employee received an increase in the regular pay rate in the prior period. When this occurs, the Payroll Administrator will calculate the amount of the increase and enter it into SPOT.

In this example, the current pay period is 3/25 – 4/9/2021. The increase is \$1 an hour based on 88 hours in the prior pay period, 3/10-3/24/2021, which are entered in the **Earns Begin Dt** and **Earns End Dt** fields.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earnings Begin Dt	Earnings End Dt	Tax Peri
1	1		0		Active	RGS	Regular Time - Salaried	03/10/2021	03/24/2021	



Tax Periods	Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #
1	Annualized	1.00	88.000000		Deduction		Deduction		0

1. Enter the following:
  - a. **Empl ID**
  - b. **Empl Rcd**: Defaults to **0**. Update if necessary
  - c. **Earn Code**: RGS
  - d. **Earnings Begin Dt**: Enter the begin date of the prior pay period
  - e. **Earnings End Dt**: Enter the end date of the prior pay period
  - f. **Oth Hrs**: enter 1
  - g. **Hourly Rate**: Enter the amount of pay to be added for the employee, based on your calculation
5. Validate and submit the transaction for approval.

**PY381 Using the Single-Use Payroll Online Tool (SPOT)**
**Review Paycheck Page**

In the **Other Earnings** section of the **Review Paycheck** page, you can see the SPOT transaction that processed for the employee.

**Begin Date** 03/10/2021    **End Date** 03/24/2021

**Addl Line Nbr** 3    **Reason**

**Empl Record** 0    **Benefit Record** 0

[Additional Data](#)

**Salaried**

**Hours** 0.00  
**Rate** 24.038462  
**Earnings** 0.00

**Hourly**

**Hours** 0.00  
**Rate** 0.000000  
**Earnings** 0.00  
**Rate Code**

**Overtime**

**Hours** 0.00  
**Rate** 0.000000  
**Earnings** 0.00  
**Rate Code**

**State** VA  
  
**Rate Used** Hourly Rate  
**Shift** Not Applicable

**Locality**  
  
**Shift Rate**

**Other Earnings**

1-1 of 1

[View All](#)

Other Earnings Details 1

Other Earnings Details 2

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Code	Description	Rate Used	Hours	Rate	Amount	Source
RGS	Regular Time - Salaried	Hourly Rate	1.00	88.000000	88.00	OP